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ABSTRACT

This workbook provides a practical approach to establishing and implementing a corporate marketing strategy within an educational environment and integrates this into the traditional college planning process. Organized in three stand-alone sections, the workbook examines the marketing challenge from three different management perspectives and levels. The first section looks at the senior management team and focuses on enabling and empowering marketing initiatives by covering self-assessment, the concept and implications of marketing, the benefits, strategic level planning, and the parameters of a marketing function. The target group of the second section is the college marketing team and deals with analysis, planning and control of marketing through review of the marketing function, the marketing of marketing, the process of marketing planning, and managing the marketing toolbox. The final section addresses the faculty/department management teams and their functions in implementing and achieving sales and reaching marketing targets. The activities and materials have been designed to facilitate delegation and dissemination of the marketing message and to provide a framework for cascading and embedding marketing thinking throughout the organization. (Contains 10 references.) (JB)

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Marketing for college managers:

a workbook for the effective integration of marketing into college planning

Angela Hatton and
Lynne Sedgmore

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About the authors

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Lynne Sedgmore is currently Head of Croydon Business School at Croydon College. She was previously the Director of the Marketing, Research and Development Unit at the college and has held marketing and curriculum posts within further education since 1986. Lynne played an active role in the FHE Marketing Network nationally and regionally and was the National Treasurer in 1990. She has been actively involved in consultancy and training in the public sector, commerce and industry. Lynne is an associate consultant with TACTICS and a Member of the Chartered Institute of Marketing.

Foreword

There is no doubt that the changes facing the world of education over the next decade will have a profound effect on the roles and responsibilities of educational institutions and, more importantly, the management style, skills and capabilities of those involved with the delivery of the educational standards now demanded by industry as a whole.

Gone are the days when colleges, polytechnics and universities could continue to operate in an isolationist capacity, unaffected by the pressures and demands of the commercial environment.

Terms such as 'customers', 'competitors', 'target markets', 'product positioning', 'distribution channels' and 'quality' are as relevant today to education as they are within the business community.

The challenge to be met is the full acknowledgement, adoption and implementation of a marketing culture - in changing the orientation of the organisation from a product or financially-led basis to focusing single-mindedly on the customer.

Education's initial response to the marketing challenge to date must be viewed with a measure of scepticism. There can be very few colleges in the country who do not now claim to have appointed a marketing officer on whom it is presumed rests responsibility for the entire solution to the issue.

Marketing is not an individual's or even a single department's sole concern or responsibility. It demands company-wide commitment and support. Contact with customers, whether internal or external, will undoubtedly feature in everybody's daily work routine.

This workbook is a very welcome initiative, more particularly as its style is designed to provide a practical approach in establishing and implementing a corporate marketing strategy within an educational environment and, moreover, to integrate this into the traditional college planning process.

There is no mystique surrounding marketing. By anticipating, identifying and satisfying customers' requirements and matching these to the skills and strengths of an organisation, the benefits to both are there to be realised.

F E Rogers
Head of Corporate Marketing
Chartered Institute of Marketing

Introduction: marketing in education - thriving, not surviving

For marketing professionals, one of the most exciting developments over recent years has been the gradual adoption of the marketing approach by non-profit making public sector organisations. For the few of us who over the same time have been directly involved in work within those sectors, watching and participating in the process from the inside has been frequently challenging and often frustrating.

Marketing demands changes, but those in the business of managing education are all too familiar with change. Throughout the 1980s, political and legal changes - compounded by massive demographic shifts and increasing economic pressures - forced educational organisations to reassess radically their objectives and the nature of their business, and to devise new structures, strategies and tactics to ensure their survival in the 1990s. As a direct response to these external pressures, many turned to marketing which today is considered as an accepted, legitimate and potentially valuable addition to the education manager's toolbox.

Yet to gain fully from the benefits marketing can offer requires still further fundamental changes in attitude and organisational culture. Embedding marketing requires a transition from a product-centred to a customer-centred operation, a process which has caused 'growing pains' to every company and operation having previously taken the marketing path - education has not and will not be an exception to this. **Real** adoption of the marketing concept is unquestionably a tough route which will take time. Education is still at the earliest stages of the transition.

The further changes required are so basic that they cannot be expected to take place overnight. The process is slow and we are very well aware of the many management issues which still need to be addressed before educational institutions can undergo the complete marketing metamorphosis. Education's marketing culture is still embryonic and it is the case that:

- there is still widespread misunderstanding - even at senior levels - about what marketing really is, and frequently little evidence that there is a real appreciation of what its endorsement means to education in the long run;

- few establishments have the financial or staff resources necessary to operate a commercially credible marketing effort;

- few institutions have developed an organisational framework or planning procedure which endorses marketing and enables it to perform effectively or as an integrative element of the college management; and

- there are still many in education who are sceptical about the contribution of marketing and, sadly, a few who resent the necessity for it.

For those actually attempting to develop and integrate marketing into an educational culture, there are any number of difficulties, barriers and obstacles remaining. Many of these we identified and a few we solved whilst addressing the practicalities of embedding marketing in a large, mixed economy college.

Marketing is not a simple, easy, speedy or painless solution to the challenges facing education today. Neither can it be viewed as the panacea for all ills. But when implemented effectively, it can offer major benefits, all of which represent important ingredients in the recipe for **'thriving, not surviving'** in the 1990s.

Marketing can benefit education by providing :

- a clear focus and framework for effective strategic development and planning;

- a mechanism for 'selling' plans and implementing change in the organisation;

- a new dimension of creativity in problem solving;

- a system for planned and effective use of resources; and

- the skills necessary to increase resources and maximise market potential.

Despite what some may see as disappointingly slow progress, nonetheless the process of adopting a marketing approach in the management of education has started, and it would be hard to turn the clock back. The often hostile attitude to marketing, evident in education circles in the 1980s, has been replaced by a general acceptance and tolerance if not always by a warm, enthusiastic endorsement. Marketing being handled by a senior lecturer with two hours remission is now the

exception, not the norm, marketing success stories exist and in many cases the benefits can already be seen. Marketing has already begun to make positive contributions by:

- increasing co-ordination at strategic level where a marketing officer has been appointed;
- improving marketing skills and awareness amongst staff;
- providing the means for effectively increasing revenue generating activities; and
- ensuring the survival of a number of colleges faced with declining traditional markets.

It is now the case that a marketing dimension has been added to most college business plans: it has become part of the *status quo*.

Given this progress it is perhaps surprising that we should have felt there to be a need for a workbook on marketing at this stage. Sadly, despite increased awareness and the noticeable change in attitude towards marketing in education, it still appears to be something of an enigma to too many college managers and also all too frequently to their marketing officers.

Some institutions are not sure what to expect from marketing, even less are sure of what is possible and few are aware of how to organise themselves to integrate marketing. There are, unfortunately, examples of colleges who think they have 'done' marketing and are moving on to other areas of activity, unaware of the true potential and leaving themselves very vulnerable to competition from those colleges continually developing a customer focus. We have found endless examples of organisations to whom marketing seems to be a mystery which they have not yet solved.

At course after course, when talking to those trying to make marketing work in their organisations, the same problems emerge:

- how do we write our marketing plan?
- how do we co-ordinate the activities of the faculties/departments?
- how do we ensure that strategic level decisions are informed by marketing ?

- how do we maximise the potential of marketing in education?

- we know the theory, but how do you actually do it?

We have produced this workbook to share with you 'how we did it'. We believe we have addressed the pragmatic issues of why it should be done, but perhaps more importantly the practical issues of how it can be done. There is no shortage of existing literature on marketing, marketing theory and anecdotes of success, but we feel that what has been missing is a straightforward manual of how to do the job - written by practitioners who understand the constraints, frustrations and obstacles that make up life for a college marketing officer.

Structure of the workbook

The book follows principles developed from our own practical experiences and builds on that gained from contact with a large number of others involved in education and public sector marketing.

We are confident you will find our step by step framework helpful, we hope you will also find it refreshing and valuable, encouraging you to approach college marketing with renewed enthusiasm and purpose. We do not disguise that our approach to making marketing work for your institution involves commitment, and requires senior management to address issues of policy and strategy which are likely to be contentious.

We have tried to make your task as easy as possible by providing background material and suggested approaches to each stage of the process, from 'do we really want to be marketing oriented?' to 'co-ordinating marketing activities at course and faculty level'.

Organised in three stand alone sections, the workbook examines the marketing challenge from three different management perspectives and levels:

- the senior management team - enabling and empowering marketing initiatives.
- the college marketing team - analysing, planning and controlling marketing activities.
- faculty/department management teams - implementing and achieving sales and marketing targets.

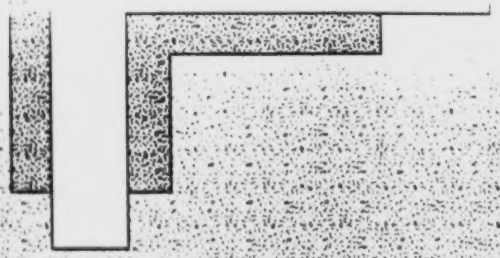
These activities and material have been designed to facilitate delegation and dissemination of the marketing message and provide a framework for cascading and embedding marketing thinking throughout the organisation. Each section can be used in isolation by the appropriate user group as relevant content has been repeated where necessary. We would of course advise that the college uses all three sections in concert, with the process monitored by senior management. Master sheets of audit forms, agendas, training programmes and questionnaires are included for your use or modification.

Education still has a long way to go before it reaches the end of the marketing road. For those prepared to complete the journey the potential rewards are exciting and worthwhile. We are confident that this material will help you make your trip as speedily and painlessly as possible.

WORKBOOK STRUCTURE - TABLE OF SECTIONS

This workbook is written in three sections, each focused at a different management level in the organisation. They have been designed to be self-standing, so where necessary material has been replicated. Each section is supported by activities and materials to help improve the effectiveness of college marketing.

Focus	Target	Role
Section 1 Marketing at the corporate level	Directors, principals, vice-principals and senior management teams	Enabling marketing to work effectively in the organisation
Section 2 Managing the marketing function	Marketing managers and marketing teams responsible for organisation-wide marketing	Developing marketing strategy, co-ordinating and monitoring the implementation of plans
Section 3 Marketing at the faculty/ departmental level	Faculty management teams: heads of faculty, departments, senior administrative staff, faculty marketing co-ordinators and programme heads	Embedding a marketing approach at faculty/ departmental level and implementing plans



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Section 1:

The senior management perspective

FOCUS • Marketing at the corporate level

TARGET • Directors, principals, vice-principals and senior management teams

ROLE • Enabling marketing to work effectively in the organisation

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The senior management perspective

Introduction

Your organisation has almost certainly made progress, possibly considerable progress, in its use of marketing. The questions we want to pose are these:

1. Are you satisfied with the contribution marketing is making?
2. Are you using marketing at a strategic as well as tactical level?
3. Do you believe that you are making the most of the potential marketing has to offer?
4. Have you taken positive steps to enable marketing to work effectively?

Our guess is that the answer to one or all of the above is 'no' or 'I'm not sure'.

Take comfort, for it would be more surprising if the answers were all 'yes'. Even those who have begun actively to embrace marketing find that getting the most from it is dependent on the slow process of integrating marketing into every management level in the organisation, involving a total culture change for many in education.

By examining how education has gone about adopting marketing you will be able to recognise your establishment and identify where you are now in terms of gaining the real benefits which marketing has to offer.

Organisational stages in the transition to marketing

Here is a tabulated view of the education approach to marketing:

Stage	Focus	Characteristics
1	Advertising, sales promotion and publicity	Most colleges began their adoption of marketing by giving a senior lecturer two hours remission and a remit focused on advertising, sales promotion and publicity (including responsibility for the prospectus).
2	Developing a receptive, positive and friendly ethos	As the external pressures increase and senior managers are heard to talk about marketing, attention turns to the external signs - typically, improvements to college reception areas and customer care training for telephone operators and admin. staff.
3	Innovation	In reality, this move is stimulated by demands for revenue generation. The results are the development of short course centres, consultancies and college companies.
4	Positioning	There are few in education who have got this far. It involves clarification of what business the organisation is in. This entails difficult choices such as: • are we in education or training ? • is this a friendly community facility offering a wide range of courses, or a 'professional' specialist establishment, with a narrow range, but centre of excellence status?
5	Analysis, planning and control	Finally, education reaches the stage of embedding marketing at strategic planning level. Clear marketing objectives, budgets and controls.

There is nothing wrong with these stages - they are all milestones to be lauded and they have created significant improvements in colleges. The key issue is that for most organisations they have been developed in a reactive and *ad hoc* way - there has been no real management of the process. As a result education has embraced the stages of marketing **backwards.**

True marketing starts with analysis, planning and control- it is to be developed as a strategic tool of management and a driving force in the achievement of college objectives. To be fair, the starting point for public sector organisations has been significantly different from that in the private sector where there was a tradition of selling and established planning frameworks in place. But whatever the background, the reality is that many colleges today are at about Stage Three of the process outlined above - committing considerable resources to marketing at a tactical level, but with no strategic foundations.

As senior management, there are some tough questions you will need to address:

- do you really want to become a consumer oriented organisation?
- do you fully understand the implications of this ?
- if so, have you done enough to enable that transition to occur?
- what else can you do to make the process of change easier and speedier?

The materials in this section of the workbook have been designed to help you find the answers to these questions.

Where are you now?

As we have said, our experience is that most colleges have reached Stage Three, Innovation, of the organisational stages in the transition to marketing, but the acid test to establish if you have passed onto Stage Four is whether or not you can confidently place yourself on our positioning map (**see Figure 1**). This map enables you to focus on and answer the questions 'where are you now?' and 'where do you want to be?'

Have you made the important strategic decisions about the quality and quantity of your product range; are you providing your middle managers with a sense of direction, a vision of your college in the future ? For without a clear strategic thrust to your planning, resources and energy will be wasted throughout the organisation. Without a shared focus there can be no synergy. Mark where you envisage your college to be on the positioning map; this will open up a range of strategic issues and requirements.

Figure 1: Positioning map

Note: It is not possible to occupy two places at once. Positioning requires tough decisions.

Where do you want to be?

There can be no half measures - you cannot achieve two positions simultaneously. A general lack of real appreciation of what marketing is and can do has resulted in some management teams believing that they have addressed the marketing issue. They have got as far as Stage Three and have then moved onto something else. In some cases this is due to a lack of real marketing understanding, in others it is an unwillingness to make and communicate tough strategic decisions - a requirement which in itself is very new to managers in education.

The reality is that most educational organisations have not started to scratch the surface of marketing. The real benefits come when marketing is developed and used proactively by management from a strategic vantage point. Ascertaining where your college actually stands in its positioning and attitude to marketing is, therefore, an important first step.

In order to research this, you should use the questionnaires that follow.

ACTION

Here are two short questionnaires. Reproduce the first one and circulate it for completion by managers on an individual basis. This will encourage them to think about marketing activities and will provide a detailed picture of the variation in views which exist within the organisation.

Following the completion of the individual questionnaires, which will ensure that managers have clarified their views on marketing activity, it is recommended that you complete the second questionnaire collectively. By using the questions as discussion points at a management meeting, a fuller picture will be obtained. It is important that there is a clear consensus established by senior management - this represents the starting point for future marketing development.

Analysis of the various views and comments returned will help you to clarify how far along the marketing path you have already travelled.

QUESTIONNAIRE 1

MARKETING IN THIS ORGANISATION - WHERE ARE WE NOW ?

This short questionnaire has been designed to help us assess our current standing on marketing issues in this organisation. It is important to have your personal views and your speedy co-operation in completing it would be appreciated.

Q1 **Marketing has an important role to play in our organisation.**

Yes ☐ No ☐ Maybe ☐

Q2 **Are you satisfied with the contribution marketing is making to the overall achievement of the organisation's objectives?**

Yes ☐ No ☐

Q3 **Do you think we are using marketing in an effective way at the moment?**

Yes ☐ No ☐

Q4 **Do you see any conflict between our marketing activities and other areas of operations and responsibility ?**

Yes ☐ No ☐

If yes, please specify:

_____

_____

_____

_____

Q5 **Do you think our marketing activities are currently adequately resourced?**

Yes ☐ No ☐

If no please elaborate: _____

_____

_____

Q6 **To help us identify the functions you think should be a priority for our marketing activity, please consider the list of possible responsibilities given below:**

- Indicate with a cross any which you feel should not be included.
- Place a number beside those remaining to indicate your priority ranking (1 = top priority).

Activity	Ranking
1. Arranging schools and employer liaison	☐
2. Seeking sponsorship and support for the college	☐
3. Filling courses which have failed to enrol	☐
4. Producing the college prospectus	☐
5. Maximising press coverage through press releases	☐
6. Ensuring reception areas, notice boards etc. create the right image	☐
7. Advising on new courses and course closures	☐
8. Conducting research	☐
9. Advising senior management during the planning process	☐
10. Writing and implementing the college marketing plan	☐
11. Establishing and maintaining the corporate image and positioning	☐

Q7 How do you feel the different levels of college management view marketing?

- **Indicate True/False against each statement. These should be your personal perceptions of the views of the following three groups.**

A. Senior management view:

- Marketing is an important and valuable dimension of our management approach. True/False
- We are totally committed to the marketing activity. True/False
- Marketing is just jargon for publicity. True/False
- We do not really understand what marketing is. True/False
- We pay lip service to the activity of marketing. True/False
- Marketing is a necessary evil. True/False
- What is marketing? True/False

B. Heads of school/middle management view

- Marketing is the responsibility of the marketing officer. True/False
- Marketing is valuable because it handles the prospectus and helps 'sell' under-subscribed courses. True/False
- Marketing should play a bigger role in this level of decision-making. True/False
- Marketing is seen as a threat. True/False
- What is marketing? True/False

C. Lecturers' view

- Marketing has nothing to do with us. True/False
- Marketing is not appropriate in education. True/False
- The customer care programme was very valuable. True/False

Q8 Should we adopt a more customer oriented focus in the organisation?

Yes ☐ No ☐ Maybe ☐

Q9 Are we prepared to make additional commitment to the marketing function?

Yes ☐ No ☐ Maybe ☐

Q10 What else would you like to see marketing achieve for us over the next 18 months?

_____

_____

_____

_____

_____

QUESTIONNAIRE 2

MARKETING: AN EVALUATION OF SENIOR MANAGEMENT'S VIEWS AND PERCEPTIONS

The individual questionnaire should have been issued and completed by the management team in advance of a meeting at which this second questionnaire should be completed collectively by you and your senior management team.

Q1 We already have a clearly identifiable marketing function.

Yes ☐ No ☐

Q2 The person responsible for marketing is:

A • full-time
(i.e. no other responsibilities) Yes ☐ No ☐

B • *either* - considered to be part of the senior management team ☐

• *or* - has easy access to senior management with a mechanism in existence for eliciting marketing feedback on a regular basis ☐

• *or* - neither of the above ☐

Q3 The person responsible for marketing/marketing officer has:

marketing experience or a marketing qualification Yes ☐ No ☐

Q4 We have an annual marketing plan.

Yes ☐ No ☐

Q5 A Our marketing activities have a realistic budget.

Yes ☐ No ☐

B What would you estimate a realistic budget to be?

State an actual figure: £ _____

Q6 Our marketing section has adequate resources, support systems and staff.

Yes ☐ No ☐

Q7 A As senior managers we have agreed on the areas of authority and responsibility of marketing, and communicated and enforced these with middle management.

Yes ☐ No ☐

B If no, indicate what we should be doing to improve the situation.

_____

_____

_____

_____

Q8 Has the size of our marketing activity/commitment grown?

- over the previous 12 months

Yes ☐ No ☐ if yes, by how much? _____

- over the previous 3 years

Yes ☐ No ☐ if yes, by how much? _____

ANALYSIS OF QUESTIONNAIRES - GUIDELINES

The first questionnaire is quite straightforward. It is intended to force managers to consider their views on the marketing activity. It will also provide you with a detailed picture of the management's perceptions and views.

The following comments will help your evaluation of the collective management response to the second questionnaire.

Q1 - Managers' perceptions of the existence or clarity of an identifiable marketing function may differ from the reality or from your view. This would indicate a lack of internal marketing of the function, or a misunderstanding of its college role - e.g. you may find that the popular view is of a tactical role for marketing, as opposed to the strategic view held by yourself.

Equally, you may find that there is a perception that corporate marketing is being undertaken 'unofficially' in other parts of the college, perhaps by the academic marketing team.

Qs 2, 3, 4 and 8 - These will help clarify the actual strength and status of your marketing function.

Q5 - Opinions on a realistic budget are likely to vary. This question should encourage managers to consider what outcomes they expect from marketing activity and therefore what is a realistic budget.

Guidelines for setting a marketing budget in the public sector arena are not widely recognised. A commercial consumer service operation would normally be allocating between two and five per cent of revenue on its marketing activity.

Qs 6 and 7 - These will allow you to identify the consensus view on how adequate or inadequate is the current status and support for marketing. They will also provide views on how this can be improved if necessary.

Remember - a weak marketing function cannot deliver effective marketing for your college.

This exercise in introspection will have helped you to get a clearer picture of senior managers' perceptions of where marketing currently stands in the organisation. No matter what stage your marketing development has reached, one thing is clear - marketing is not a function that can exist in a vacuum or as an annexe to your main activities. The benefits of marketing are worthwhile, but they do not come cheap; the down payment is a genuine commitment from senior management.

Belief in marketing has to start at the very top of the organisation. If there are any remaining doubts or confusion in your senior management team about what marketing is, or what the adoption of a customer orientation would mean to the organisation, then this is the first area of action you need to address.

Are you sure you want marketing?

By adopting marketing in an *ad hoc* and reactive way, many colleges have followed the marketing fashion, but without really considering its full implications.

To answer the question 'are you sure you want marketing?' - up to and including Stage Five - it is essential that everyone in the senior management team really knows:

- what marketing is,
- what potential benefits it can offer, and
- what price you will have to pay for those benefits.

ACTION

If you are amongst the colleges who have not yet embraced the strategic level of marketing, we strongly recommend taking time out for a 'Marketing Away Day' for the senior management team, with an experienced education marketer as a facilitator.

S/he will then be able to take you through each of these questions in a structured way and allow you to develop an agreed and appropriate action plan.

Our outline programme is attached to help the facilitator to address all the issues.

MARKETING AWAY DAY FOR SENIOR MANAGEMENT

This programme has been put together as a suggested format. It can be modified and developed to meet the requirements of your organisation. Indicators of content and approach for the facilitator are included in *italics*.

Aim

The aim of the day is to allow senior management teams to take time out to address the strategic management implications of a more marketing oriented approach to education.

Objective

By the end of the day the management team to have a clear, written statement indicating the degree of commitment to marketing and the bones of an action plan for its implementation.

Requirements

- A qualified marketing facilitator, preferably with some experience of education marketing.
- Working room, preferably away from the college to avoid distractions.
- 1 flip chart for each group of 3/4 managers.

AWAY DAY THINK TANK: PROPOSED PROGRAMME

9.00 am **Welcome and outline of the day's objectives.**

9.15 am **What is marketing ?**

- *Review of the philosophy of marketing and the marketing concept.*
- *Examination of the development of the marketing concept and changing management philosophies from product, to sales, to consumer orientations.*

10.00 am **Where are we now ?**

If not already completed, the questionnaires provided on pp7 -12 of Section 1 may provide a useful focus for discussion.

*Managers to work in groups to identify where they currently are in terms of the marketing concept. The objective is to locate their establishment on the continuum of product, through sales to customer orientation, as detailed on p24 of Section 1 (**Figure 2**).*

Suggested indicators to examine include: the organisational structure, current role and level of authority for the marketing function and the type and amount of staff training in marketing completed, the resource allocation to marketing, and the use of marketing intelligence and views in strategic and tactical decision-making.

Groups report back with evidence of key indicators.

10.30 - 10.45 Coffee

10.45 **The costs and benefits of a marketing philosophy**

Facilitator-led review of the costs, e.g. reorganisation around customer groups, the influence and input of marketing orientation needs in practice, the resources it would need and the training required - and the benefits of marketing.

11.30 **Do we really want marketing here?**

We suggest that the management team spends 10 minutes in twos and threes formulating their views on the value of the strategic development of marketing. Then bring the whole team together to discuss this proposal:

> We believe that to thrive in the 1990s, this organisation needs to become consumer-oriented and therefore must whole-heartedly plan to move forward from our current position on the continuum.

Set a clear deadline for the end of the debate and a decision to be made by lunchtime.

Afternoon session: developing action plans

The format of the afternoon will need to be flexible in order to respond to the decisions made in the morning.

If the management team has decided to opt for a sales orientation, the session will comprise developing an action plan to improve the sales aspects of the establishment - e.g. corporate image, publicity, prospectus, sales training for staff etc.

Note: *It will still be important to concentrate on the strategic management implications of these improvements, i.e. budgets, staffing etc.*

Objective: *to achieve a timetable and commitment to the improvements agreed.*

If management have decided to go for a marketing approach, similar issues of budgets and resources need to be addressed, but in addition to a realistic timetable for reorganisation, staff training and production of a marketing plan.

Suggestion: *management works in smaller sub-groups looking at specific implications, e.g. timetable or costs and then gives feedback to the full group.*

By the end of the afternoon, the facilitator should have the bones of a plan in writing, indicating a timeframe and budget: this must be agreed by the management team before the close. Arrangements for follow up and individual responsibilities for action should also be written down.

Although a half day session is sufficient to cover much of the marketing content outlined in this programme, our experience is that a full day produces the action plan commitments necessary to ensure the required implementation and results.

For those unable to find the resources for a Marketing Away Day, the proposed programme together with the following activity and its debrief notes should provide the bones for a DIY version, which could be developed as part of your normal management meetings.

Our experience has shown that if management do not clarify their understanding of marketing both as individuals and as a team, it leads to organisational difficulties. Clarity at this stage is essential. Below is a very simple but worthwhile exercise.

ACTION

Take five minutes to ask your management team what they think marketing is, or look at the priorities for marketing they have indicated on the questionnaires. You are likely to get a variety of responses, but most will centre around the activities associated with marketing - advertising, selling, research, product planning and so on.

Take time to discuss the various views expressed and try to come to a consensus. Emphasis on the tactical activities of marketing usually indicates a lack of understanding of the true nature of marketing - not how it works, but why we need it.

There are still common fallacies about marketing, and the following summary of what marketing is and is not may help in your debrief.

WHAT MARKETING IS NOT . . .

- **Marketing equals profit-making**

  Adopted eagerly by the manufacturers of fast-selling consumer goods like soap powders and tinned foods, marketing was somewhat hijacked in the late 1950s and 60s. These companies took to marketing so readily because they realised its potential in helping organisations to achieve their objectives. For them, objectives happened to be profit-based. The public sector is only just realising that it too can benefit from the marketing discipline - that marketing is not exclusively for profit-makers.

  The picture was further clouded by the timing of the introduction of marketing to the public sector. The catalyst for change was the cutting of budgets and the increasing demand that public sector services find alternative ways of generating income and support to 'top up' finances. Marketing skills were bought in and the perceived link between profit and marketing was strengthened.

  Note: Experience of working with many senior managers in the public sector has shown us that this single misunderstanding of marketing can and does create some of the greatest barriers. It is often fundamental to any resentment of marketing. Mistakenly, some believe that marketing implies all services should be charged for and the role of marketing is to add the price tag. These worries cannot be swept under the carpet - they need to be identified and tackled. This brand of antagonism to marketing is detrimental to the successful implementation of a marketing orientation.

- **Marketing equals selling or advertising**

  An equally common misconception is that marketing is the jargon or buzz word for selling or advertising. This is hardly surprising when you consider that in many educational organisations the marketing executive is still a glorified publicity officer, responsible for the college prospectus, sending out press releases and arranging school/employer liaison (i.e. at Stage Two or Three in the transition to marketing as outlined earlier on p2).

  The result is that marketing has a low status role in the organisation because it makes no contribution at strategic level. This uncoordinated activity is not marketing, and the potential benefits of a strategic marketing approach are not forthcoming.

- **Marketing is the responsibility of the marketing staff**

  This is a fallacy which stems from another misunderstanding of what marketing really is. Marketing is not an activity that can simply be delegated to a member of staff to be 'done'. Marketing is a philosophy of the business; it works when management have decided that the focus for all activity is to be the consumer of their services. To be effective, that belief/culture/approach to the operation has to be all-pervasive. This is particularly true in a service sector where most staff are in frequent contact with the client.

  The marketing job has to be the responsibility of everyone in the organisation - but its impetus has to come from senior management, as it is they who determine culture and focus for the organisation.

WHAT MARKETING IS . . .

- **Marketing is a philosophy of business, which is based on the belief that the key to survival in a competitive environment lies in the organisation's anticipating, identifying and satisfying the consumers' needs, profitably. In this context profit should be interpreted as successfully achieving the organisation's objectives.**

- **Marketing acts as a funnel for the organisation's activities and energy, focusing and channelling the 'power' of its resources to an identified target. In this way, resources are not wasted and objectives are more likely to be achieved.**

- **Marketing provides the framework which encourages people in the organisation to work together, creating a synergy which ensures effectiveness.**

- **Marketing is a catalyst for change.**

The concept and implications of marketing

Marketing as a philosophy of business is enshrined in the concept of marketing. Adopting marketing means much more than simply using the tactical tools of research, advertising, publicity and so forth in an unco-ordinated way. In practice, adopting a marketing approach means that the whole structure, thinking and approach of the organisation has to be gradually reoriented, so that what the customers need and want (not what you **think** they need and want) becomes the driving force of the organisation. All decisions are then made in terms of their impact on the customer.

Adopted at a strategic level, marketing is a powerful agent for change and few in education can really relish the thought of yet more change. The implications of marketing in terms of the required commitment and degree of likely change are far reaching for most educational establishments. It is not surprising that the impact and role of marketing has been misunderstood and will take time to achieve.

With such an apparently high price to pay it is perhaps even more surprising that anyone in education is even thinking about marketing. So why not just stick to using marketing tactically?

Endorsement of our view of the critical importance of marketing and the necessity of embedding its philosophy deep in the organisation can be found in many popular management texts. From Harvey-Jones in **Making it happen** (1988) to Peters and Waterman in **In search of excellence** (1982), success is invariably shown to be because the organisation has developed a clear focus on the customer. Marketing provides an external focus for the organisation's 'people' orientation - valuing the customers - just as personnel is responsible for developing and valuing the resource of the workforce. But as the price is high, it is right that management consider the options before going further down the path of marketing.

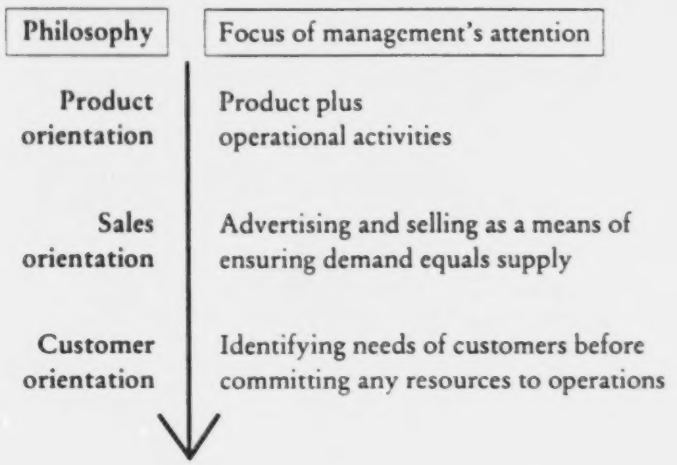
WHAT ARE THE OPTIONS?

The changes in management philosophy have been charted in **Figure 2** overleaf to explain the relatively recent importance of the marketing concept.

An examination of this process allows a review of the options open to management. It also explains:

- why marketing is such a relatively new business force, and
- why it is now becoming important across the public sector.

Figure 2: The changing focus of management's philosophy

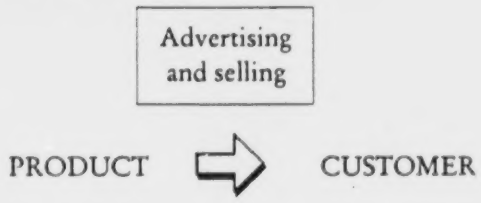

Philosophy
Focus of management's attention
Product orientation
Product plus operational activities
Sales orientation
Advertising and selling as a means of ensuring demand equals supply
Customer orientation
Identifying needs of customers before committing any resources to operations

PRODUCT ORIENTATION

In business environments where there is no competition and limited supply, management can afford to adopt a *laissez faire* attitude to the customers. Management energy and attention tends to be focused on the operational and production aspects of the business. The most senior positions are usually filled by technical/operations people. Decisions are made in terms of how they will effect the production process and the staff.

This has been the position in education, at least until very recently. Protected by the shield of the public sector, education has evolved primarily around the products and the needs of the staff. Term times are the equivalent of the opening hours that banks used to have before competition forced them to respond to customer needs. Senior college staff are almost always operations people who have been promoted, as opposed to trained managers, and education is mainly organised around the product - faculties and schools related to a subject area. The focus of attention in most educational organisations has been on provision.

SALES ORIENTATION



The next stage is the one which we believe most educational managers are confusing with marketing. It occurs when environmental changes first force the realisation that customers are possibly not so plentiful and they need to be attracted to your particular product. The confusion arises because the promotional activities commonly associated with marketing are used to present the product to the marketplace. It is consistent with reaching Stages Two and Three in the organisational stages indicated on p2.

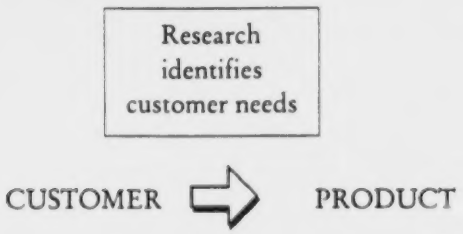
This approach is not radically different from product orientation. The product still comes before the customer. Product decisions are made without identifying customer needs clearly. The sales activity is simply tagged on to an operation revolving around the product.

Most educational organisations are slipping into this stage, but are misguidedly and wrongly thinking that this means they have adopted a marketing approach. For them the image of marketing being a buzz word for advertising and selling is not far from the truth. But this is to misunderstand marketing. Most college marketing staff are really sales staff pushing the products we want to offer to the customer. Professionals in education hide behind the plea of professionals everywhere, namely that they know better than their customers, and therefore the decisions must be theirs. Fears about quality and lack of consumer knowledge are normal.

The role of the professional in a consumer oriented organisation is to identify what the market needs and wants and **then** to use his/her professional skills to develop and deliver a product which meets the standards professionally required **but** also satisfies the clients' needs. We can no longer afford to fool ourselves that we know what the market wants without asking and listening. We cannot assume that we know best.

Consider this for instance - how many times have you sat in a course board or student meeting, treating students' comments about toilets and coffee facilities as unimportant because it is the quality of teaching input or exam results that really matter? Would you not be disgruntled (and understandably so) if your complaints about the toilets in a restaurant were trivialised and ignored with the reaction 'we are in the catering business and the food is first rate'?

CUSTOMER ORIENTATION



The need to put the customer before the product sales operation comes only when the environment has changed so significantly that some suppliers will fail. Operators in education are being forced into change in order to compete to win student numbers, new types of customer or to secure adequate funding. This is the stark reality facing education in the 1990s. It is a reality which most managers are well aware of. Our concern is that too few realise that they still have not actually enlisted the benefits which marketing can offer to help ensure their future is one of thriving, not just surviving.

The benefits of marketing

For most in education there is undoubtedly still some way to go to complete the transition to a customer orientation - but there are benefits at the end of the road. There are a number of arguments which can be put forward as to why it is worthwhile seriously considering the further investment necessary to adopt fully the marketing philosophy:

- Of those who put their energy instead into a selling activity, some will fail. Others who are more proactive and who develop courses and delivery options designed to meet the needs of specific client groups will become more and more competitive. Those who do not adopt this approach will find it increasingly difficult to maintain demand. The short-term solution will be to compete on price, but that will lead to the downward spiral of less income, and even less facilities, then an even worse product followed by even less demand. Those local colleges with a monopoly of the market will not be exempt - they will be forced to compete with new products, residential and short courses, open learning etc.

- Evidence and experience from other sectors shows that most of those who do survive are forced towards a customer orientation and away from a product one. In other words you cannot avoid the changes which marketing will bring. You can only decide whether to continue reacting bit by bit, or take a proactive stance and decide to manage the culture change required, introducing it at your own pace.

- Marketing provides a framework and a set of 'tools', which will allow your organisation to compete effectively, creatively and flexibly - not only for students, but also for funding and support.

- Used strategically, marketing provides an approach which will ensure you are using your scarce resources to achieve determined objectives. The principle of marketing is all about 'adding value'. This can provide the key to revenue generation and some degree of financial independence.

The decision as to how much commitment to put behind marketing must be yours. Our plea is that it should be an informed debate and the decision made only after senior managers have taken sufficient time for consideration.

For those who want to take a proactive stance to adopting the marketing approach, the remainder of this workbook is designed to help you with the process.

It is more difficult to assess and advise on the appropriate time frame. Changes need to be gradual, but should be evident. The process requires planning and the starting point will be different for different organisations. In all cases the driving force will need to be you, the senior managers. The responsibility cannot be delegated to others. Our experience is that change is only effective when commitment comes from the top.

Building marketing into strategic level planning

This is the critical step to be taken in order to make the successful transition to marketing and a market orientation. For most educational organisations it is not the first step on the road, because as we have seen, many already have a recognised marketing function undertaking some of the activities of marketing. Unfortunately, in most cases the links between those delegated to 'do' marketing and the corporate decision makers are weak, if not almost non-existent.

ACTION

Take stock of the current standing of marketing in your organisation by completing the following assessment of the strengths and weaknesses of your marketing function and activities.

CURRENT STRENGTHS AND WEAKNESSES OF YOUR MARKETING ACTIVITY

To be clear about your starting point, we have developed this assessment form to help trigger and clarify your evaluation of the current marketing activities you undertake. Review the questionnaires completed earlier to help in this. Needless to say, the objective is to build on your strengths and take positive action to rectify the weaknesses.

ASPECT	*STRENGTHS*	*WEAKNESSES*
Marketing staff		
Marketing resources		
Marketing budget		
Marketing's representation at senior management level		

ASSESSMENT FORM

ASPECT	*STRENGTHS*	*WEAKNESSES*
Marketing planning		
Marketing activities e.g. research advertising PR selling		
Status and image of marketing throughout the organisation		
Success of marketing		

GETTING STARTED

You will need to have, or develop, the following:

- **a marketing function**, adequately staffed and resourced, positioned centrally and working directly to senior management. Ideally and ultimately, the manager of this function will be part of the senior management team. Tackling the organisational issues which marketing brings is fundamental. In many colleges, marketing staff lack seniority, making their interaction with heads of faculty ineffective. In others, the marketing function has been absorbed by a vice-principal. In these cases we doubt that there can be enough time allowed to deal adequately with the detailed aspects of marketing planning. In functional terms marketing should be positioned as in **Figure 3**.

  The ideal level for the post is that of assistant principal, or there should be the use of a marketing consultant on a retainer basis to perform the necessary strategic input.

Figure 3: The functional position of marketing

- **a corporate marketing plan,** developed to deliver the identified organisational objectives. This needs to come before the development of faculty and course plans in order to have a direct influence on their development.

- **a system/mechanism to cascade marketing initiatives into the faculties** with support and authority to ensure that the marketing plan is implemented effectively at course level.

- eventually you will find the need for **an organisational structure** which reflects your key customer groups rather than your products. Those establishments who have opened short course units and tertiary centres are already beginning to move in this direction.

We are only too well aware that satisfying some of the above requirements may be a slow process, particularly where there are limited resources available. Nonetheless, significant progress can be made by building marketing into the thinking and planning activities of the college. This is the most basic change required and in financial terms it is cheap to do.

CORPORATE OBJECTIVES AND STRATEGY

There is one more key ingredient which has to be provided before marketing can begin to work proactively for the organisation - there has to be a set of clear statements about the organisation's objectives and direction.

Most senior management teams will by now have produced business plans with mission statements, objectives and a clearly established planning cycle. To be of value these plans have to be specific. They need objectives which are realistic and achievable but, most importantly, **quantified over time.** They also need an indication of strategic approach.

> **Without these the organisation has no sense of direction; marketing cannot help to focus resources to the achievement of an end which has not been clarified.**

COLLEGE PLAN REVIEW

Review your existing college plan:

- Does the mission statement clarify your organisation's area of activity?

  Statements about catchment areas (local, regional or national) can limit or expand the options for marketing strategy:

  - are they clear?
  - and do you mean them?

  Statements about equal opportunities need backing-up, not only with policies, but with objective targets - for example, to increase the proportion of women/ethnic groups or disabled from x per cent to y per cent over the next two academic years.

- Have you answered the thorny questions about quality and quantity of courses offered?

  Senior managers cannot sit on the fence. Focused centres of excellence are unlikely to be compatible with the commitment to provide a wide range of courses for the local community. When resources are limited, priorities have to be set - ideally, based on clear market research. These priorities provide the parameters for strategic planning and need to be established clearly.

  Present your views clearly with a positioning map (see p4) and clear statement of what business the college is in.

- Does your plan contain clearly quantified objectives?

  These can be set in terms of the number of full-time equivalents (FTEs) you want to support, income you want to generate, pass rates you want to achieve. There are any number of options, but these objectives should represent a clear distillation of what the establishment is there to achieve.

- Are there indications of timescale given in the plan?

A series of short-term objectives with no feel for the overall long-term objectives provides little real sense of corporate direction and will lead to a series of annual plans which fail to have any synergy with each other.

The political involvement in the setting of budgets and the day-to-day running of college finances has led to short-term planning and narrowed management vision. There is now less excuse for this.

- Does your plan clearly communicate the direction you wish the institution to move in?

- Does it indicate how objectives are to be addressed?

For example, are budget constraints to be met with cost cutting exercises or revenue generating ones? Without this lead, finance and marketing operations are likely to be working against one another.

- Can you set down what you want to achieve for the organisation over the next five years?

- Has your business plan been communicated to the members of your staff?

  - Who has a copy?
  - Are you sure?

Try management by walkabout - go and check. Ask a random selection of lecturers and administrators what they think the college's priorities are.

Finally ask the marketing personnel:

- do they know what the college's objectives and priorities are?
- do they have a copy of the business plan?
- what do they need from senior management to develop an effective marketing plan?

You may be surprised at some of the results you get from your business plan review; most of the plans we have seen fail these basic tests.

For marketing to be effective these basic corporate strategy issues must first be addressed.

Without clarification at this level, the organisation can only progress by individual functions and areas establishing their own priorities and objectives. In the end these will be working against each other creating friction and wasting resources.

Warning:

If your college has failed to provide marketing staff with corporate objectives and direction - take action immediately. We have recommended in Section 2 of this workbook that they progress by producing their own, if senior management has failed to provide them.

MARKET-DRIVEN PLANNING

What are the practical arrangements you can make to facilitate the building of a customer/marketing perspective into future plans?

It is essential to feature marketing clearly at the beginning of the planning cycle, with a brief to senior management about changing customer profiles, environmental reviews and market research analysis.

Developing a marketing orientation means that every level of decision-making needs to be influenced by identified customer needs. Including the marketing manager as part of the senior management team is your insurance policy that this is the case at strategic level. Organisations which are unwilling or unable to take this step in the recognition of the marketing role need to contrive mechanisms to provide the marketing perspective on a regular basis.

Termly marketing updates

One suggestion is to establish a regular marketing update for all senior management.

This should take the form of a presentation and workshop rather than a written report. This is essential because the dialogue between marketing and management needs to be open and two-way.

A suggested briefing sheet for your marketing manager is provided as a starting point for the first meeting.

Cascading a marketing awareness into the rest of the organisation requires an increase in marketing knowledge and the development of specific marketing skills. What priority have you given to marketing and sales training in the organisation?

BRIEFING SHEET

TERMLY MARKETING UPDATES

Points which can be covered:

- Update on the progress of the marketing plans and objectives.
- Reports on marketing projects and priorities.
- Identification of any environmental and competitive changes.
- Communication of short term marketing objectives and tactics.
- Identification of marketing problems, resource requirements, and action needed to improve the effectiveness of the marketing function.

Management's plans:

- Identification of any issues or plans or developments being considered by management.
- Discussion of any quantified objectives and targets to ensure that they are reasonable and achievable from the marketing perspective.
- Identification of product/market opportunities which need market research now in order to enable future management evaluation.

The parameters of a marketing function

There is no single correct set of guidelines as to what marketing should or should not do, as it will vary with the level of expertise, resources and the development of marketing in your college.

As we see it, the priorities of a marketing function are the following:

1. **To advise and inform senior management decision-making.**

   Providing the market information and customer perspective is dependent on quality marketing research. Resourcing this activity is a priority.

2. **To translate corporate strategy into marketing objectives and strategy, for dissemination to the college operational sections (i.e. faculties and departments). Faculty marketing plans should be produced by the marketing officer in consultation with faculty management teams, and their implementation monitored.**

   Marketing is a management role, so there is a focus on planning and monitoring the implementation of plans. This role will be met by resistance from faculties and will need support. But marketing planning requires marketing expertise and until that has been developed in all education managers this expertise needs to be provided from the centre, in much the same way as for finance.

3. **To facilitate and co-ordinate college-wide marketing activities.**

   An under-resourced marketing section will be unable to achieve this, but there is sense in - for example - providing staff with publications experience in order to undertake prospectus production, the co-ordination of press releases, support and advice on the production of course sales literature and possibly also the internal staff newsletter.

   These are specialist activities requiring specialist skills, not general marketing skills. They are also time-consuming, detailed tasks which prevent real marketing tasks being completed. Use of an external agency or consultant as necessary may be a more cost effective option for smaller institutions.

4. **Creation and maintenance of a clear and consistent college image.**

   Having agreed in consultation with senior management the appropriate image to reflect the college's positioning, the activities associated with this important element of service marketing are immense and will take time and resources. However, getting the right decisions early on means that gradually, as new literature is produced, notepaper printed, areas redecorated or new signs put up, a consistent image is established and maintained.

5. **Co-ordination of college sales activities.**

   This might comprise schools liaison, exhibitions, client sales visits, direct mailing and sales advice/training to course directors. To provide the full range of services your marketing manager will require support from a marketing assistant.

Suggestions for 'Making it happen'

There are no quick fix marketing solutions, but we have a few suggestions which might help 'make it happen' in your college

Inadequate staffing for marketing?

- Look to appoint a senior marketing manager.
- Review the marketing expertise within your teaching staff along with useful tactical skills in other disciplines.
- Consider using marketing expertise from a neighbouring college for the short-term.
- Appoint a marketing consultant to establish a marketing strategy and plan which can be implemented by less experienced marketing staff.
- Consider using your own, or other college students to undertake marketing research projects and other specific marketing activities.
- Develop in-house marketing skills through staff development and training.
- Consider sharing marketing staff and specialist skills with one or two other local colleges. In this way you may be able to employ a researcher or a communications specialist.

Inadequate marketing budget?

- Can it be increased from central sources?
- Have you given the marketing function authority over all elements of a marketing budget - the prospectus budget, the college entertainment allowances and advertising budgets?
- Can the marketing function be given a brief which allows it to generate and retain revenue to expand its own budget?

- Can the marketing function charge its internal customers for services provided?
- Have sponsorship options been considered?
- Can the marketing resource be increased in other ways - for example by increased staffing, or allocation of staff training budgets?
- Talk to other colleges. Offering a print contract for two or three college prospectuses should get you a better deal than by negotiating alone.

Be seen to make it happen.

- In conjunction with those involved in the marketing function produce an action plan for marketing. Clearly indicate priorities and time scales - even if it is to take years.
- Give marketing the status and prestige it needs throughout the organisation. Refer to it, be seen to involve marketing in the early stages of planning and development, and support it against resistance from operational middle managers, if necessary.
- Make sure that the remaining sections of this work book are disseminated and acted upon. Ask for formal evaluation and feedback.

Summary

Marketing is a new dimension to be added to the thinking of education managers. It requires fundamental changes to accommodate it fully and these changes will take time, resources and commitment. The rewards are considerable, because those colleges who embrace marketing fully will find they are better informed and equipped to respond proactively and creatively in the future.

The marketing approach can be used to achieve more effectively any objective of management. Used on internal influencers and advisers like the local education authority (LEA) it can give your college a competitive advantage in the battle for resources and funding; it can help you win support from local industry and ratepayers as well as assist in identifying new and exciting product/market opportunities.

We are confident that adopting a clear and logical approach to the development and integration of marketing as described in this workbook will make your task easier and is the recipe to ensure your college thrives in the 1990s and beyond.

Good luck.

References

Harvey-Jones, J (1988) **Making it happen.** Collins

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Marketing for college managers:

a workbook for the effective integration of marketing into college planning

Angela Hatton and
Lynne Sedgmore

Section 2

BEST COPY AVAILABLE

Section 2:

The marketing team perspective

FOCUS • Managing the marketing function

TARGET • Marketing managers and marketing teams responsible for organisation-wide marketing

ROLE • Developing marketing strategy, co-ordinating and monitoring the implementation of plans

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The marketing team perspective

The marketing function

This section of the workbook is designed to meet the needs of those who are responsible for the implementation of marketing in their college or institution.

We have met many of you and know that there is considerable variation in the experience, seniority and marketing knowledge amongst those working in education marketing - we have tried to take these differences into account.

As experienced marketers ourselves, we are well aware of the obstacles and challenges still to be faced in this new arena for marketing. Our objective here is to share with fellow marketers our practical advice, hints and tips for putting marketing theory into practice in an educational context. We have concentrated on the aspects of the marketing role which we believe reflect the true nature of the task, that is to say, management of the marketing function.

This workbook is arranged in three sections to help facilitate your broadcasting of the marketing message, both to senior management and to the operational middle managers running faculties and departments.

This middle section is focused on the needs of the marketing team. The material and activities we have included will provide you with an approach and a framework to help overcome many of the practical difficulties involved in the marketing of education at corporate level.

We begin by addressing the fundamental issues involved in establishing and integrating the marketing function and philosophy in the college management framework. It is clear to us that although the process of colleges becoming customer-oriented is likely to take years, until that shift begins, the role of college marketing will remain an overstated activity. The tasks that senior managers

typically assign to marketing officers - i.e. prospectus writing or limited sales functions - do not reflect the real contribution that marketing should be making to colleges, and as such do not justify the title of marketing. We know that marketing has much more to offer; your task is to ensure that college managers appreciate this.

We have paid only scant attention to the specific tools and activities of marketing. Plenty of material has already been produced on these issues. Instead, we have chosen to address a more neglected aspect of marketing - managing the marketing function. We have taken a detailed look at strategic and planning issues before addressing the tactical aspects of the marketing toolbox and ensuring the implementation of plans.

It is not easy to establish a marketing function in the public sector. You are pioneers in this respect. There is no history or tradition of sales or selling, advertising or even formalised planning in education. You cannot expect to run a marketing operation, with limited resources, on the models operated by the manufacturers of branded consumer goods. Gaining skills and expertise in this area will take time, but much has already been achieved.

The rewards of education marketing are immense and satisfying, because small steps generate substantial improvements. Working with limited budgets and resources is frustrating, but it also sparks off exciting creativity and innovation in marketing.

We hope that you will find additional inspiration and support in the pages of this workbook.

Reviewing the marketing function

In our experience there is a great deal of misunderstanding about the true nature of marketing. College management can easily convince themselves that having a marketing officer/team is the same thing as having marketing. We believe that a large number of college managements are confusing the use of tactical marketing tools, in pursuit of sales objectives, with real marketing management. The difficulties caused by this misconception mean that the embryonic marketing function in education has to accept two distinctive aspects to its activity:

- to market itself
  - establishing and embedding the marketing function within the organisation; and

- to market the college
  - developing marketing strategy and managing marketing activities; and
  - co-ordinating and monitoring the implementation of marketing plans.

In this section of the workbook we address both these aspects of the marketing function and its activity within colleges.

THE NECESSITY FOR EMBEDDING THE MARKETING FUNCTION

College management in general may not have recognised the first of these two aspects of marketing activity, or appreciate the critical importance of it - but it should remain your on-going priority. The marketing function is unable to generate the maximum benefits to the organisation until marketing is clearly established as part of the college culture. The marketing activities and functions have to be underpinned by the marketing concept.

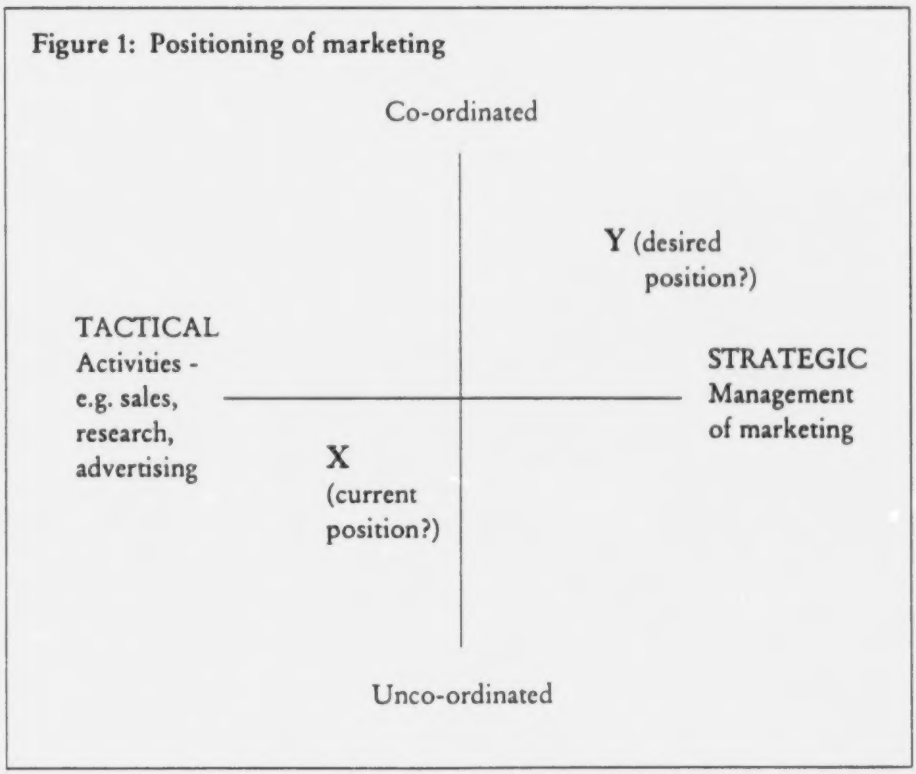
Marketing is still a very new facet of education management. In most colleges the marketing function has evolved in response to changing pressures on the institution, often beginning as academic remission given in return for 'doing' the prospectus, then extended to include advertising, school liaison and possibly customer care training. So the function in most colleges has developed in an *ad hoc* unco-ordinated way, with a concentration on the activities associated with marketing and limited appreciation of the true nature, scope and potential contribution marketing can make to education.

Typically, the marketing officer has been loaded with short-term tactical projects, tying him/her up with so much detail that there has been no time to look at the marketing function as a whole.

Firefighting, rather than strategic planning, is the characteristic role of too many college marketers. In reality the post has been that of a salesperson for the college rather than a marketing manager. Few have the support or resources to delegate detailed delivery to others and so they become trapped in a vicious circle. This is a situation which in the long-term benefits neither the organisation nor the marketing personnel.

Your first task is to tackle this state of affairs - college marketing has to be pulled out of the mire of tactical marketing activities and dusted off, ready to take its real place as a management function involved with decision-making, planning and control. This will not happen overnight, but by identifying where marketing now stands in your college and clearly recognising the place it should hold, you can develop a plan which will engineer its gradual repositioning. **Figure 1** shows a positioning map for marketing in colleges. This map enables you to focus on and answer the questions 'where are you now?' and 'where do you want to be?' as a marketing function. Your senior managers should undertake the task of placing the college on a positioning map. Encourage them to do so, or if they are reluctant,

Figure 1: Positioning of marketing



do it for them. See Section 1, p4 for explanation. This is a different, but related, exercise.

It must be made clear that the process of placing the customer rather than the product as the focus for an educational institution's activities will take time - probably years. It involves a re-orientation of the attitude of management and the culture of the educational organisation. It is, nonetheless, the role of the marketing function to act as a catalyst for this transition.

The function of marketing, clearly, is to provide a focus on the customer which enables the organisation to identify, anticipate and satisfy customer needs in such a way that the objectives of the organisation are achieved.

To achieve this effectively, marketing has to act as the voice of the customer, informing decision-making at every level. This is obviously not realistic or possible if the responsibility for marketing is held by just one person, or even by a nominated team of people. The only practical solution is for marketing to be used to ensure that the philosophy of satisfying the customer is adopted throughout the organisation. Marketing theory talks of organisational integration - everyone working together with the aim of satisfying the customer. This philosophy is also being advocated by those actively following the total quality management route. In practical terms this can only be achieved through widespread marketing awareness. Staff training needs to be a priority for those involved in spreading the word and the responsibilities of marketing throughout education.

The pivotal function of marketing can be seen in **Figure 2**. It involves working closely with senior management and co-ordinating the marketing activities of the rest of the organisation.

Unfortunately, these sorts of illustrations can in themselves cause difficulties. Naive and defensive managers can take them to be hierarchical rather than conceptual. They cannot accept the positioning of a junior-graded marketing officer as being in some way 'above' that of departmental heads. In the long-term, the status and value of marketing together with its authority can only be endorsed and enforced by senior management. In the short-term it is possible to achieve a great deal by negotiation and by using personal powers of persuasion. Understanding the concerns of academic colleagues and treating them seriously and sensitively means that progress can be made and support for marketing initiatives won.

We advise you to identify one or two sympathetic managers and work through them. Results speak louder than words; the piloting of activities is often a speedy way to get results and recognition of potential, and is much less exhausting than

Figure 2: The pivotal function of marketing

trying to start with a consensus. Pay particular attention to the outward signs of your activities and the progress that has been made. The harsh reality is that you will be judged on the quality and delivery of projects under your control.

We have a clear view as to where the marketing function should be positioned, and that is as a key service reporting directly to senior management, with the role of co-ordinating, monitoring and controlling the marketing activities carried out within the organisation.

With a well-resourced marketing function, some of these activities - such as marketing research - will be provided centrally and be under the direct control of the marketing team. However, it is more likely that many of the activities of implementation (in particular the sales effort) will be undertaken by departmental college staff who should be working with advice, support and co-ordination from the marketing team. New procedures need handling sensitively - for example, that all press releases are to be cleared through the marketing manager. As we have said, course directors will for years have been responsible for the marketing and selling of their own programmes. They should be considered as your product

managers and sales teams, with their efforts co-ordinated and encouraged, in order to produce a synergy.

College marketing is in effect being imposed on a long established sales function, performed by course directors. This development needs to be introduced gradually - sales targets and enrolments should remain the responsibility of course teams. The marketing function should assist, support and co-ordinate their tactical activities, not be seen to usurp them.

Any relatively new marketing team is faced with the problem of positioning themselves *vis-à-vis* other functions and departments. The common lack of understanding about the work of marketing has always made them an easy target for complaint - education marketing is no different.

It is our belief that in most colleges the correct positioning of marketing is as an internal consultant, providing the expert marketing input to management plans and activities whilst ensuring that the college objectives and marketing strategy are addressed in concert. Great care should be taken to ensure that your team is aware of its role and the position you want to adopt in the organisation. Your own internal marketing should be an example to others.

Colleagues should all be treated as customers, which of course they are if you are positioning yourself as an internal consultant. Indeed, with this model, college marketing could charge internal customers for its services, generating budget for additional resources. Resentment from faculties and course directors can be avoided if there is a clear communication of the areas of responsibility and authority for aspects of marketing activity.

Ultimately, marketing - particularly in a service sector - can only be truly effective if it has the wholehearted support and approval of all those in the organisation. All operational staff in the service sector are in a sense marketing staff. It is their enthusiasm and commitment which will determine whether or not objectives are achieved, and the consumers' needs satisfied.

There are two models of consultancy which you could adopt:

Expert consultants - they would prepare the faculty plan on behalf of the faculty management team, after a briefing concerning objectives, operational constraints etc. The faculty staff would then be responsible for implementing the plans and the consultant would monitor progress and advise on necessary modifications.

Process consultants - in this model the marketing team works closely alongside the faculty team, helping them to develop and integrate marketing

into their own planning processes. This takes time, but is preferable as it is a practical way of undertaking staff development and embedding a marketing dimension to faculty thinking.

There needs to be functional control of the marketing activity and those involved with it, if not line management control. Marketing should be positioned at a strategic level managing the whole of the marketing function. Marketing departments typically employ specialists to perform the activities of advertising, selling and research.

The marketing of marketing

Where are you now?

We recommend as a starting point that you and your marketing staff take time out to review the current status and resources of your marketing function as well as its opportunities and threats. An up to date assessment and audit will provide a basis for developing strategies to achieve objectives in both aspects of your marketing activity, that is:

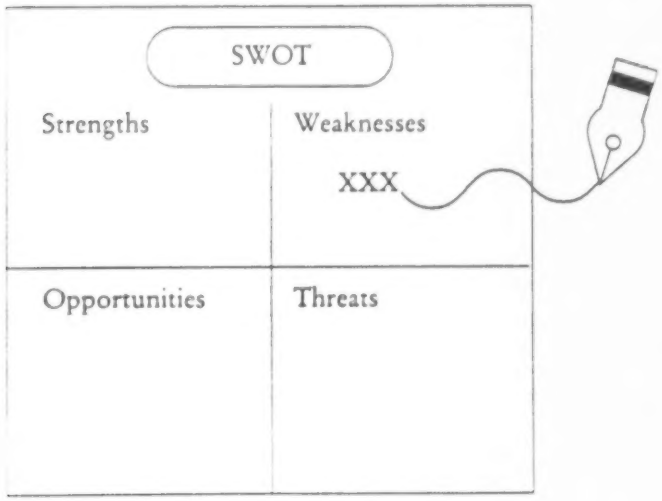
- marketing marketing
- marketing the college

A weak marketing function cannot deliver a well marketed college facility.

List key aspects under the four headings as below.

ACTION

SWOT analysis:



SWOT ANALYSIS - MARKETING REVIEW

Use the technique of SWOT analysis to review:

- strengths and weaknesses of the college marketing activity:
  - remember, these are the internal, controllable items like resources, staff, reputation, budget etc.
- external factors which cannot be controlled and can be classified as opportunities and threats:
  - e.g. are there any likely changes in college policy, proposed re-organisations or staff changes that may affect marketing?
  - is there any opportunity for the marketing function to generate income by charging internal customers for their services, or charging other organisations for marketing training or consultancy etc?

Take sufficient time to do this activity thoroughly.

Obviously, your task now is to capitalise on your strengths and exploit opportunities, whilst addressing weaknesses and defending against threats. From your analysis set objectives and priorities for the marketing function:

- over 12 months
- over three years.

Once again, take time to work these out properly. They should be realistic and achievable as well as quantified against time. Make sure you confine yourself here to objectives related to the marketing of marketing.

SHORT TERM OBJECTIVES (12 months)

1.

2.

3.

LONG TERM OBJECTIVES (three years)

1.

2.

3.

PRIORITIES

e.g.: - to make a presentation to senior management within 3 months.

- for 60 per cent of all college staff to have attended a marketing awareness programme by . . . . . (specific date)
- to have 2 additional full-time staff in the marketing team by . . . . . (specific date).

Based on your objectives and priorities prepare a simple action plan designed for achievement and delivery.

Make a note now of deadlines and review dates. One of your most difficult tasks is to find time to deal with the fundamental and strategic aspects of your role.

ACTION

Ask someone, preferably not a marketer, to undertake a straw poll of colleagues. Try to ascertain:

- current views on the college marketing function
- level of awareness of its objectives
- staff views on what it should be doing.

Do not take the answers too personally, but do act on them. Take positive action.

Improving college marketing: the process of marketing planning

One of the most common difficulties we have found amongst college marketers lies in the area of marketing planning. The theory is fine, but actually putting it into practice is much more difficult.

The approach we have outlined here works, we know this from practical experience. It is not the only way, but it does provide a practical framework which you can modify and adapt once you are happy with the process.

By following the activities we have outlined, you will produce your own marketing plan. Take time over the process, but without agonising over it. Plans can and should be changed and modified. Planning is an ongoing process, not a once a year activity. If you do not get it right first time, do not worry. There will be plenty of opportunity in the future for modifications. Like any business skill, your competence will improve with practice.

It is important to recognise from the outset that no plan is ever likely to work exactly as written. Planning is about controlling an uncertain future. It is not the detailed targets and objectives which matter, but the fact that you are laying down an intangible template or route map against which you can monitor progress and evaluate the effectiveness and efficiency of your activities.

It is the ongoing control dimension of planning which is most important. Do not worry about getting your first plan right - write your plan, monitor the actual outcomes against those intended, and learn from the process.

Getting started is the hardest part of any new task.

We start with a checklist for a marketing plan.

CHECKLIST OUTLINE FOR A MARKETING PLAN

This is a summary of the key elements of a marketing plan. Details of how to produce one follow on from this list.

Marketing plans have to be working documents, which are revised and changed as circumstances dictate. Their role is to provide a clear focus for those implementing the plan and so they need to be written concisely and clearly, and be communicated throughout the organisation.

If, for some reason, a lengthy and detailed document is necessary for senior management, then produce a second, abridged version which can be used for those required to implement it.

1. Situational analysis

   A brief summary of the current market position of the college - e.g. market share, competitive strength, changing patterns of demand, current image and an assessment of available marketing resources. It should indicate the current and proposed positioning of the college.

2. Marketing objectives

   These should be short, clear, quantified and indicate an order of priority.

   You may wish to indicate in this part of the plan the corporate objectives and strategy these are designed to deliver. This is particularly important if you have had to assume corporate objectives (see later in this section, pp23-29).

3. Marketing strategy

   This should be a broad based statement of how objectives are to be achieved. Part of the marketing strategy should be a clear statement of how the college wants to be positioned or perceived by its customers - e.g., as specialised or generalised, modern or traditional, up-market or value for money, etc. Fundamental to this is clarification of the target customer or market segments the college wishes to serve. Avoid too much detail, but include any agreed

areas of responsibility - e.g. college revenue is to be increased by 20 per cent by identifying courses and activities which are not price sensitive, then establishing a mechanism and policy to increase fees.

4. Detailed action plans

These should indicate timescales and budgets.

Product - changes to college facilities or the course portfolio, e.g. improved facilities in reception or lecture rooms, new course provision for women, or language courses added to the business school.

Promotion - Key promotional objectives should be included, for example to have 20 potential new corporate clients visit the college during the spring term.

A detailed promotional plan, with a timescale clearly indicating key deadlines (e.g. prospectus copy deadline and publication date), planned mailshots, advertising features and objectives for public relations activity.

Price - indicating any corporate decisions on repositioning course portfolios in terms of price plus timescale; changes in payment procedures etc.

Place - enrolment and availability issues. Convenience and flexibility of provision are potentially critical selling benefits which need assessing.

5. Control

Issues relating to how progress is to be monitored and controlled need to be indicated. Performance against targets and goals is essential to enable modification of plans, reassessment of resource allocation and improvement of the planning process in the future.

1. SITUATIONAL ANALYSIS

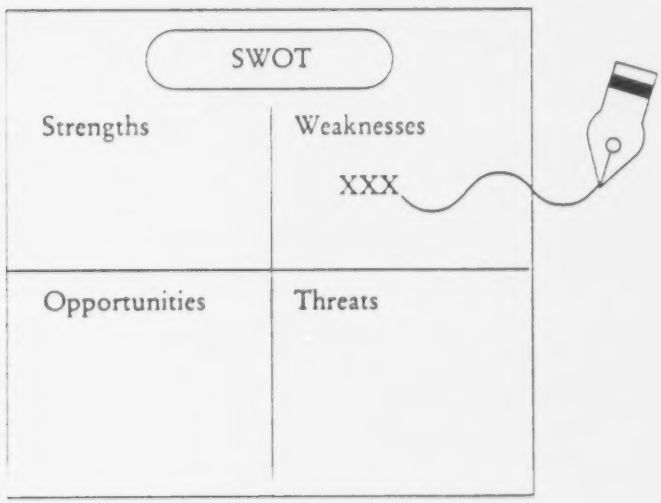
Undertaking a marketing audit

Marketing planning can only start when you have a clear picture of the current market position of the entity you are trying to promote. This is true whether you are marketing a course, a faculty or the whole organisation. The primary role of the college marketing manager is to market the college - a corporate level activity. It is this which you need to audit.

The process will take time and, if you do not have a well established management information system, may require specific marketing research projects to provide both primary and secondary data. With a clear picture of what you need to know, this process should not be too difficult. Where you make audit assessments based on judgements and perceptions, do not worry - just remember the limitations that you have built in to your analysis and make the development of a college-wide marketing research capability high on your list of priorities.

ACTION

Repeat the SWOT activity, but as a marketing audit for the college.



SWOT analysis - marketing audit

This time the strengths and weaknesses should be categorised under the four Ps of the marketing mix - Product, Promotion, Price and Place. The opportunities and threats should be categorised in terms of market opportunities, the threats from competitor activity, and declining market segments, etc.

Remember - for every strength there is likely to be a compensating weakness, and threats can be turned into opportunities.

The checklist that follows on the next three pages will help you to formulate your analysis.

The audit process may take some time, particularly if one has not been undertaken previously, but don't rush the process. It is important to take it seriously and do it honestly. Consider the whole college operation, warts and all. It is on the basis of this assessment that your marketing plans and strategies will be based.

CHECKLIST FOR A CORPORATE MARKETING SWOT

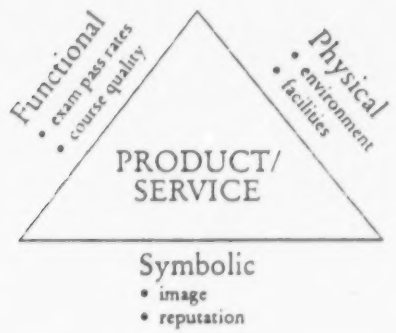
STRENGTHS AND WEAKNESSES

Product:

- range, mix and level of courses offered;
- timing, flexibility, variety of delivery styles and times;
- other services available: distance learning, access to library, student restaurants, meeting rooms;
- the quality of the environment: image, level of service and atmosphere;
- range and standard of facilities provided.

In the eyes of the customer, products/services exist in three dimensions (see **Figure 3**). It is the combination of these which makes up the product package. You need to consider and assess all relevant characteristics. Remember - it is how these are perceived that matters.

Figure 3: the product package



Promotion: Each of the following needs consideration in terms of quality, consistency and level of effectiveness.

- quality and level of promotional activity currently employed: prospectus, advertising, press releases, school visits and

exhibitions, personal selling activities (including corporate entertainment);

- corporate identity: review thoroughly and check, for instance, how many versions of the college logo exist throughout the college, and if type style is consistent on all external correspondence; examine course literature - does it fit into the corporate style?

- and, in addition, consider the sales skills of course directors.

Price:
- how are course fees set, and are pricing decisions made in the light of marketing considerations?
- do prices reflect quality?
- what are the customers' views on the prices?
- can fees be paid by credit card, or in instalments?
- how do prices compare with those of the competition?

Place:
- when and where can customers buy your product - only during enrolment week, with lots of queuing?
- are courses available throughout the year?
- do you provide courses in other locations?
- are courses available at weekends, early in the morning, as short intensive blocks or only as two evenings per week?

After sales service:
- is there any?
  e.g. follow up to corporate clients, counselling for individual students etc.

OPPORTUNITIES AND THREATS

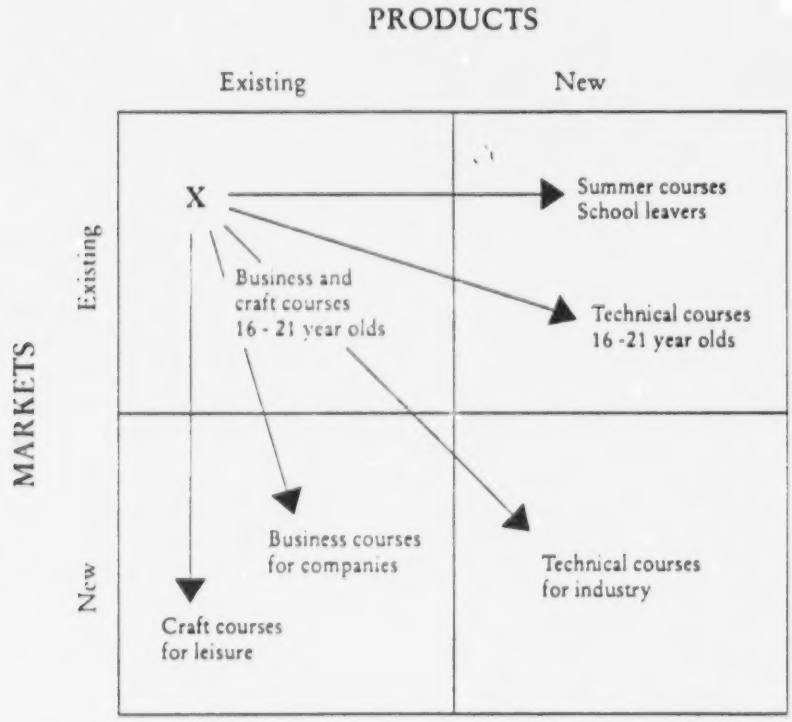
Competitors:
- who are they, what are their strengths and weaknesses.

Changing demand:
- where are there changes in demand for your products/services?

- where are there possible opportunities as a result of environmental changes?

Remember - all market opportunities are in terms of product/market opportunities. Ansoff's matrix can be used to chart them (see **Figure 4**). A quick and easy method for identifying possible areas of opportunities and threats is to get a group together for a brainstorming session.

Figure 4: Ansoff's matrix - a sample chart



See References at the end of this section for where to find more details of this technique.

2. MARKETING OBJECTIVES

The senior management's role

If the channels of communication are available between you and senior management, you should use your evaluation from the marketing audit as the basis for a report to them. The areas of priority identified and the opportunities seen should be factors considered by senior management prior to their establishing corporate objectives. If communication is not so readily available in your college, then take the following course of action.

ACTION

Ask for the opportunity to make a presentation to senior management, for the purpose of reviewing college marketing.

Prepare a formal presentation supported by your analysis both of college marketing and the marketing function.

In it you should communicate clearly:

- where the college is now
- where it could go - product/marketing opportunities.

Encourage their views and feedback on these options at this stage. This will be valuable input for decision-making at a later point.

Using the college plan

Marketing does not operate in a vacuum. It is only one of the organisation's functions, which between them should deliver the agreed objectives of the institution. These should be identified clearly, in the college plan, along with any constraints expressed in college policy. You should have a copy of the college plan.

Marketing can only deliver what is clearly requested. Objectives have to be expressed in quantified terms over time, with indications of priority given and strategic direction indicated.

Unfortunately, many educational institutions are in fact very new to the whole concept of planning and plans. They are currently going through the motions of planning without any real sense of its purpose. If your college falls into this category you will almost certainly now be faced with your first but biggest stumbling block - don't be surprised to find that your college plan includes aims not objectives. Typical vagueness, confusions and contradictions to be found in such plans include:

- woolly thinking and sitting on the fence with no criteria for assessing progress and allocating budget;
- a mission statement indicating both the desire to be an international centre of excellence and a community college;
- discussion of delivering more courses, maximising income from short courses and equal opportunities provision - but offering nothing specific as to the basis for planning and delivery.

You must be clear, even if senior management are not.

It is not possible to write a marketing plan without clearly quantified objectives.

It is not possible for marketing to contribute to moving the college forwards without clear strategic guidance.

For many, we suspect that these are the missing elements, the reasons why marketing planning has been so difficult. You cannot write a marketing plan without corporate objectives and strategy.

Finding those elusive objectives may not be easy. Management may be unwilling to be specific, or they may just not have realised the significance of this failing.

ACTION

- Try to get senior management to give you clear objectives (even just one or two would do to start with).
- Encourage them to work through the first section of this workbook - our input will reinforce your arguments.
- Failing this, write your own objectives. It is the only way to move forward.

  Note, however, that this is not theoretically the right procedure. In effect it means that marketing has taken over in determining the strategic direction of the organisation.

  Stick to the policy of the college and make sure that objectives are realistic and achievable. You may find that seeing your objectives encourages management to produce their own.

Objectives will obviously vary widely from college to college. In private sector operations they would nearly always be written in financial terms. In the education sector, colleges may have objectives that look like the following:

- achieving a target of (a specified number of) FTEs by 1993/4;
- having 40 per cent of revenue budget provided from central funds by 1995;
- 48 per cent of student population to be women (increase of three per cent) by 1993/4; or 28 per cent of students to be from the over 30 age group;
- being the preferred choice for post-16 education amongst over 70 per cent of school leavers in a 20 mile radius, by 1996.

By whichever means you have arrived at your list of college objectives, your next task is to turn these into marketing objectives. In order to complete this process, there is the other key aspect of the college plan which you need and which should help to provide the parameters for your planning - namely, an indication of the broad strategic approach which management wish you to adopt.

To expand on this: corporate objectives can be achieved in a number of ways, for example, increased revenue can come from charging a higher fee for all students, or from diversifying into short course training and attracting a new segment of high paying students. The decision is determined by the way the college sees itself developing.

The market position the college wants to attain in the future **should** be clearly communicated in the plan, in the form of positioning statements and strategic decisions. These decisions are the equivalent of a private sector firm deciding whether it expects to operate primarily in the UK or have a pan-European presence after 1992. The answer will fundamentally affect every subsequent decision made in the organisation.

The college needs to know, for instance, whether it wants to be positioned as a centre of excellence, or a community based service; should it be self financing on a particular percentage of its courses; should it be positioned in training or education. There is obviously a wide variety of alternatives, but they represent clear choices and are some of the decisions your senior management needs to have addressed and, equally importantly, should have communicated to you. Ideally, they should have undertaken the college positioning map exercise as recommended in Section 1, p4.

Figure 5 overleaf can be used to communicate college positioning. Change the axes to meet the needs and choices facing your institution.

This aspect of college planning does, however, involve management in making very difficult, often political decisions which it may as yet have been unable to do. If this is the case, it is again up to you to make a decision you can work towards.

Make your choice in an informed way, set against your perception of the college's culture and future opportunities. Your SWOT analysis should be a valuable starting point to clarify your options.

Choose one direction which you can work towards - for example, increasing the percentage of revenue generating activities, or moving towards a profile for training rather than education.

Figure 5: Positioning of the college

Note: It is not possible to occupy two places at once. Positioning requires tough decisions.

Where do you want to be?

Corporate into marketing objectives

Organisational level objectives will probably have little meaning to operational staff. In order to disseminate any plan throughout the organisation, objectives and strategy are broken down and translated. In this way every member of staff is working to objectives which are relevant and have direct meaning to him or her.

The process of interpreting corporate objectives into marketing terms is not difficult and with experience and practice it becomes second nature. At these early stages of marketing awareness in education, establishing the process and disciplines of this framework are more important than necessarily 'getting it right'.

In particular, if this is the first time you have produced a marketing plan, accept now that it will not be perfect. Accept that you are unlikely to achieve all the objectives you have set. It is more important to proceed and get the plan set down on paper.

Remember, plans can - and should - be reviewed regularly and modified in the light of improved information and a changing environment. Next year your plan will be that much better and the process much less painful.

Marketing objectives guidelines:

- they must be based on corporate objectives;
- they must be quantified over time;
- they must be expressed in terms meaningful to those who will implement the plan;
- they must be perceived to be realistic and achievable; and
- they must be related to marketing issues pertinent to the whole college.

If we take some of the corporate objectives identified in our examples earlier (see p23) we can look at the process of converting them to marketing objectives.

Example

Increasing the number of FTEs by X amount is a corporate objective, with immediate implications for funding. However, it is not specific enough to inform operational managers of what is expected. Put in terms of a marketing objective, this would be expressed more specifically and in sales terms; for example, that this means enrolling Y more part-time evening students, or Z day-release students or achieving W short-course student days. The positioning and strategic direction indicated for the college will help in deciding which of these courses of action to adopt. In practice you may well choose a combination.

Objectives related to increasing external funding and/or increasing fee revenue, once again, should be described in measurable targets with identified segments and areas of focus - e.g., to generate £30,000 of sponsored support from the local business community by 1995.

A corporate objective of increasing the proportion of women, older people or ethnic students also needs translating into the number of additional enrolments which need to be made in each category. These specific targets can be better planned for, and performance against such targets more easily monitored.

There are of course many alternative strategies for achieving these objectives. In the above examples, for instance: positive action on applications implemented by course directors; the development of new courses to meet the needs of the identified targets; special pricing structures; new modes of delivery; and additional targeted promotions. The important thing is that you should have a clear sense of what has to be achieved and an awareness of the direction in which the whole organisation is moving, in the light of which you can make informed decisions.

Note: Do not make your planning initially too complex by trying to achieve too much at one time.

ACTION

Working with the corporate objectives and strategy against a background of your college marketing SWOT analysis, compile a realistic, short list of priority marketing objectives and write them down, clearly and simply.

Avoid ifs and buts. If you are having to include exceptions and caveats there is something wrong with your objectives. They should be capable of being expressed in one or two lines.

Now review the marketing objectives: are they specific, quantified over time; are they realistic, achievable and relevant to the whole college?

If not, think again.

3. MARKETING STRATEGY

Getting to the strategic statements

By this stage, you should have a picture of:

where you are now - from your SWOT analysis;

where you want to go - as expressed in your marketing objectives; and the next stage is

how to get there - this is the strategic statement which will provide the sense of direction, in marketing terms (influenced by the college's strategic intentions).

As indicated already there will undoubtedly be strategic options - different ways of achieving the same objective. Your role is to identify, evaluate and then select the most appropriate of these options.

ACTION

Identifying options

Use creative techniques such as brainstorming to help identify as many options as possible, for the achievement of each objective.

Evaluation

Each of the options must now be assessed, as each will provide different benefits and will imply different costs in terms of impact on image, use of resources etc.

Each option may need researching to help quantify the size of market segments or to assess the value of market opportunities. For those with an embryonic research facility this will in itself be a long and difficult process.

In the first instance we would advise that you do not let inadequate research stop the process of planning. It is precisely in this area that your plans will be improved and refined over time as you are able to develop more sophisticated marketing tools.

There are a number of evaluation techniques in existence, including screening, cost/benefit analysis and SWOT analysis; choose one that suits the situation and use it rigorously and consistently.

Our preference would be to put all potential solutions through a screening process to assist in drawing up a short list of alternatives. This is done by compiling a set of criteria, ranging from costs to corporate policy issues, and then considering each option against these.

ACTION

Selection

Devise a list of criteria against which you can screen all the options you have identified. Those which fail against more than one of your criteria should be excluded. The strategies which pass the screening process are then evaluated by applying a SWOT analysis to each to assess their relative feasibleness.

From the results of these processes, choose one option.

The end result is that the best solution is selected and the costs/benefits quantified as a final check. This is the strategy which will now be included in your plan.

The next part of your marketing plan should be a statement of the directional choices and decisions which you have made - a broad brush statement of strategy, a communication of how you intend to achieve the marketing objectives.

For instance: the objective of enrolling 400 extra women on to part-time courses in the next academic year will be achieved by a strategy of new product development (new courses designed to meet the needs of the local female community) supported by targeted promotional activity.

Note the lack of tactical details - nothing about what type of promotion or where, which segments are to be targeted etc. - this will come later in the main body of your plan.

Another example: the objective of increasing the college revenue budget by X per cent will be achieved by identifying courses and activities within the college which are price sensitive, and establishing a mechanism and policy to increase fees, with an appropriate target and timetable for each.

4. DETAILED ACTION PLANS

The body of material included in a marketing plan consists of the more detailed, tactical action plans and budgets associated with implementing the strategy.

A critical aspect for compilation of this part of the plan is the undertaking of the necessary research to inform clear statements regarding market segments to be targeted by the college.

The more tightly these segments can be identified the more effective will be the marketing effort. When dealing with college-wide activities, there will of course be a number of segments to which the college needs to address itself. The strategic direction and objectives will, however, allow you to prioritise these. For example, if there is a revenue generating objective with a strategy to develop a short-course provision, the target market will be companies. Tight segmentation requires that this is specified, for example to middle-sized companies operating within a 15 mile radius of the college, employing between 50 and 500 people and with a turnover of at least £2 million.

The process of segmentation needs further work from the marketing department as the buying behaviour and decision-making units operating in this sector need to be researched and identified. You need to know the following information.

- Who currently provides the training to this sector?
- Who in the company makes the training decisions, and who influences them?
- What are their training needs, and which are not currently satisfied by the competition?
- When, where and how are training decisions reached?
- What factors influence the decision - price, availability, timing of courses etc?
- How can this market segment be accessed?

The amount of information you will have available at this stage depends on the market research function available to you.

ACTION

Taking each of your objectives and strategies, go through the process of identifying - researching where necessary - target markets, decision-making units and buyer behaviour for all of them in turn.

Segmentation is the tool marketers use to ensure clear targeting of the marketing effort. The co-ordination of that effort is spelt out in the plan and entails balancing the elements of the marketing mix. These are the variables which marketing can change in order to influence demand and they are represented by the four Ps of product, promotion, price and place or availability (what each of these encompasses was indicated in the marketing plan checklist on pp16-20).

Although each of these variables is described separately, it is important that marketers remember that it is only when the variables are managed in concert that a synergy is achieved, producing the desired outcome with a minimum use of resources.

A complete marketing plan would include a detailed action plan encompassing activities against time and budget for each of the four Ps.

Note: take care with the timeframe in the area of education, as academic years and public sector planning often limit flexibility. Operational constraints such as gaining course approval mean that new product development needs planning over the medium rather than the short-term time period.

5. CONTROL: MONITORING AND CONTROLLING THE PLAN

Marketing control is an intrinsic part of marketing planning. Throughout the planning process you need to identify and be aware of issues relating to the monitoring and control of progress. Build in tools such as performance analysis, market-share analysis, revenue/cost controls and clear monitoring mechanisms for the achievement of your objectives. If your objectives are clear and quantified, monitoring is made relatively easy. Link the monitoring controls to the corporate plan control mechanisms where possible.

CONCLUSIONS

The five steps outlined above will enable you to produce a college marketing plan, with all the key elements included.

Be clear about your own objectives and strategy - everything else will follow. We have not included too many specific examples as we do not want to influence your own particular thinking and circumstances.

If you are unfamiliar with some of the planning and marketing tools used, you will find more details in the texts referred to in the bibliography at the end of the workbook.

Managing the marketing toolbox

The marketing philosophy is implemented in practical terms through the activities of marketing, which we refer to as the marketers' toolbox - research, planning, selling, advertising, publicity etc. Successful implementation of a marketing strategy is dependent on your access to people who are skilled in the use of these tools. These skills are only just beginning to emerge in the field of education, and the limited resourcing of the service indicates that improved provision will take time.

Your only option is to use what is available to you now and be clear as to your priorities so that improvements are focused on the most critical aspects of your operation. The SWOT analysis that you will have conducted on the marketing function should have helped you to identify areas of priority.

It is not within the scope of this workbook to offer detailed advice on the individual tools of marketing; there is plenty of literature already available and many of you will already be well on the way to setting up the specialist functions of marketing. There is a bibliography at the end of the workbook.

What we have done is to provide some brief suggestions in order to help you to make marketing happen in your college or institution.

Suggestions for making marketing happen

MARKETING RESEARCH

- Marketing research is a priority area, because good planning is dependent on good quality information.

- Managing the research function means focusing on CATS - Cost, Accuracy, Timing and Security of marketing research. Always clarify what you **need to know** and do not confuse it with what would be **nice to know**. If you are not undertaking research personally, the quality of what is provided for you will be dependent upon the quality of the brief you provide for your researcher. Always put research briefs in writing.

  The checklist on p37 gives an outline to clarify the respective roles of the manager and the market researcher.

- Available research information is more abundant than you may think. Check out the local education authority and council for reports on the demography and socio-economic features of the area. The Chamber of Commerce should be able to provide information on and possibly access to local business.

- Consider using students to undertake research projects for you as assignment work for business studies or marketing.

- Are you getting all available information possible from your college's administrative systems? Colleges are amongst the few businesses in the fortunate position of knowing their customers individually.

- Market information needn't be expensive. Are you collecting your share by walking around? College customers won't find their way to you - meet them in the bars and refectories, make a point of going out and talking to students once a week.

- As soon as you are able to employ additional help in the marketing team we would recommend that you appoint someone with market research expertise.

CHECKLIST FOR MARKETING RESEARCH

Produce the brief:

- Clarify the nature of the research problem
- Provide background and information already available
- Indicate constraints in terms of:
  - cost
  - accuracy
  - timing
  - security

Produce the research proposal

Collect, analyse and evaluate data

Prepare and present research report

Whether research is conducted in-house, or by an external agency, the eventual value of the data produced depends on close liaison between the researcher and manager - at all stages.

PROMOTION

This is a vast area of activity, which can soak up energy and generate few tangible results. Clear management is essential.

- Establish clear promotional objectives and priorities in support of your marketing strategy, and stick to them.

- Ensure that you have clear agreement and authority to implement activities in order to co-ordinate and establish the chosen corporate image. This is a critical area of activity with many aspects:

  - clarify the image/logo and style to be adopted. This may involve using a designer; if so, be specific in the brief. For instance:

    - provide clear deadlines and budget limitations;
    - make sure that typefaces selected are commonly available on college software, or easily provided;
    - ensure that unusual sizes are not selected for literature as printing, envelopes and postage can all then be more expensive;
    - ensure that new logos photocopy easily.

  - identify all areas pertaining to college image;
  - produce a prioritised list of where changes need to be made;
  - find out who is responsible for each area, then discuss and brief them on the necessary changes. Do not rely on circulars.

- Sort out the prospectus. It is a key piece of corporate literature and it will not go away. You should:

  - conduct a full review clarifying with management the objectives of the prospectus, its uses, circulation etc.;
  - use expert help to ensure that an effective communication tool is produced;
  - consider joining forces with other colleges to get a cheaper print price.

- Find ways of increasing help on the labour intensive corporate sales activities such as school liaison and local exhibition work. Set up a working group drawn from across the college to undertake college-wide selling activities. Arrange for staff development to improve selling and negotiating skills.

- Work with faculty teams to improve course and faculty promotional activities.

- Establish a process of exception reporting for all projects so that changes in demand, costs and so forth are immediately flagged for your attention.

- Make sure that your limited budget goes as far as possible. Think creatively about attracting resources and using publicity opportunities to meet identified objectives.

There is much more to be said about college-wide marketing, but we have highlighted what we believe to be the key issues and identified some of the areas for priority action.

Make sure that the other sections of this workbook are used and don't try to achieve too much at once.

Good luck.

References

For more information concerning the Ansoff matrix, see:

Kotler, P and Fox, K (1985) **Strategic marketing for educational institutions.** Prentice-Hall (p138)

Kotler, P (1988) **Marketing management: analysis, planning and control.** 6th rev. ed. Prentice-Hall (p48)

Marketing for college managers:

a workbook for the effective integration of marketing into college planning

Angela Hatton and
Lynne Sedgmore

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Section 3:

The faculty team perspective

FOCUS • Marketing at the faculty/departmental level

TARGET • Faculty management teams: heads of faculty, departments, senior administrative staff, faculty marketing co-ordinators and programme heads

ROLE • Embedding a marketing approach at faculty/departmental level and implementing marketing plans

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The faculty team perspective

Introduction

The three sections of this workbook have been compiled in order to help colleges take a hard look at what marketing means to them, and then take the necessary steps for planning its adoption and implementation. At three different levels in the organisation a different focus and response is required:

- the driving force for change has to come from senior management;
- the overall marketing expertise and support must be provided by the corporate college marketing team;
- but the choices involved in implementation, and the difficult task of making marketing work, rest with you - the faculty managers.

Each separate section of this workbook has been compiled to assist colleges in the task of addressing the challenges posed by integrating and embedding a marketing approach to the management of educational organisations.

The need to integrate the marketing dimension into the planning process is as essential at faculty level as it is at college level. The material in this section addresses the management requirements and implications of a more marketing oriented approach to faculty operations. However, in this workbook we have not attempted to address the development of tactical marketing activities such as attracting sponsorship or writing course leaflets. There are already available a number of extremely good publications which do this very well and we have included references to them at the end of the workbook.

What is marketing?

Marketing is an approach applicable to any activity which is able to identify clear objectives. In essence, it is an attitude of management which puts the customer at the centre of the operation. It requires a recognition that we are only in business to satisfy the needs of our customers and consumers. Put simply, without students and their employers or parents, we would be out of business.

This represents a major change in the philosophy of management who have traditionally concerned themselves with the needs of the operation or product rather than the customer.

The transformation in attitude has usually been brought about by significant changes to the business environment. In the private sector, massive technological changes have led to increased output and intense competition, while in the public sector, political changes which have led to reduced budgets have resulted in equally intense competition for funding and survival.

In the field of education we have faced additional pressures caused by immense demographic changes and new forms of competition as different types of learning products have been made increasingly available. As our traditional markets have contracted and competitors have increased, the education business has and will continue to become more competitive. Organisations and departments which fail to respond to this new environment are not likely to survive. The changes which will ensure continued growth and success will be those which directly address the needs of customer groups, be they students, employers or parents.

Market orientation based on this philosophy of putting the customer at the centre of all decision-making is the approach many education managers are now turning to, in order to provide a framework for their business planning.

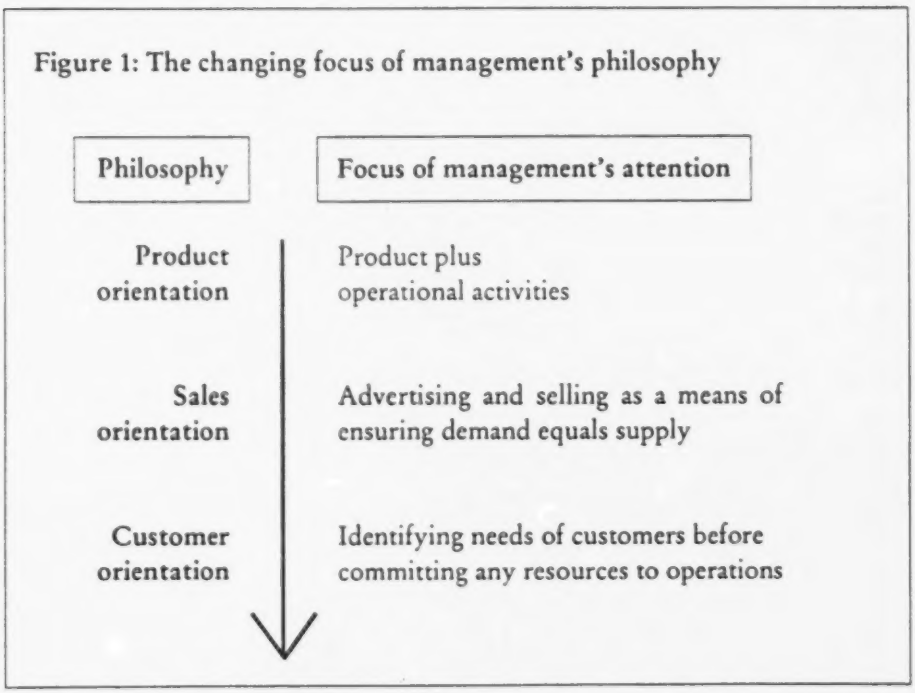
What is a marketing orientation?

Marketing is a relatively new concept to most of those involved in education. The structures and cultures in colleges and polytechnics have traditionally reinforced management's thinking and decision-making around the product rather than around the needs of the customers.

Faculties are traditionally organised in subject areas and there is little time or energy spent in assessing whether or not the needs of identifiable customer groups such as part-time or full-time users, women, black or mature students can all be satisfied by the same approach and facilities. Our concerns have mostly been in terms of the academic quality and validity of our teaching programmes, assessed mainly by peers, not by users of the college services and programmes - in other words, product not customer based.

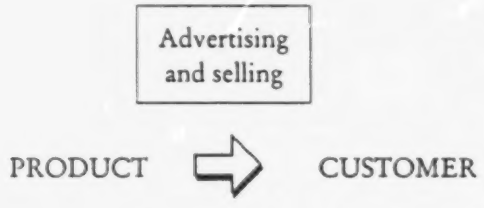
Marketing theory identifies three distinct stages in the transition towards a customer or marketing focus for managers (see **Figure 1**).

Figure 1: The changing focus of management's philosophy


Philosophy
Focus of management's attention
Product orientation
Product plus operational activities
Sales orientation
Advertising and selling as a means of ensuring demand equals supply
Customer orientation
Identifying needs of customers before committing any resources to operations

Despite the innovation of a central marketing function for many colleges, it is easy to see that education is still very much product driven, but with an increased investment in selling, for:

- managers are typically 'operations' people who have been promoted;
- the operation is organised around the product, i.e. the courses and subjects (hence the product focus of the faculty structure);
- emphasis is on what is produced, not what the customer wants. Term times are restricted, delivery modes are traditional. In these respects education is like banks providing limited opening hours, before building societies forced them to compete;
- college managers decide what courses they want to run and then try to sell them.



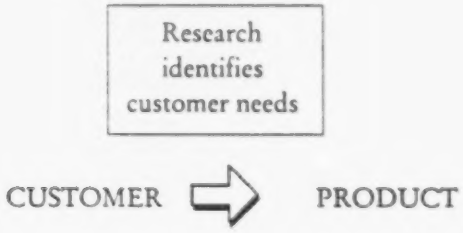
This situation cannot last. Education, like so many sectors before it, is being forced to change by its rapidly changing environment.

There is evidence that this evolution is already happening: talk of flexible college years; the opening of short course centres to meet the needs of identified market segments; improvements in facilities and services to students. These are all indicators of the impact a change in approach is likely to bring.

As marketing must increasingly become adopted by educational institutions, so we can expect to see a gradual change in the organisation of colleges to reflect the market segments they are serving. But to date, marketing thinking is still in its infancy in education. The major cultural changes necessary to shift colleges to a customer oriented approach will occur in an evolutionary rather than a revolutionary way. Resistance to these changes is hardly surprising and marketing is not openly welcomed in a number of quarters.

The reality is that change is necessary for survival. The financial, political and competitive pressures of the 1990s mean that only those who take a proactive stance will thrive, and others will fail or be dragged - kicking and screaming if necessary - towards a customer based focus in their decision-making. It has happened to other sectors already and education will fare no differently. Those who are slow to adopt a proactive approach to these challenges may lose out on resource allocation which will go instead to more active providers. Equally, a faculty may find its resources diminishing in favour of colleagues more willing to change.

Those who survive and thrive in the challenging environment of the 1990s will be those who put the customer before resource allocation, not after it.



We strongly believe that college and faculty management **should** take a positive approach to the inevitable.

The current position of marketing in colleges

Marketing in most colleges is still at the embryonic, product or sales oriented stage. In our experience, most colleges are currently failing to use marketing effectively. The activities associated with marketing are still being used in an *ad hoc* way to achieve sales objectives. As a result, the areas of marketing responsibility and authority between course directors, faculties and central marketing can appear to be in conflict.

An examination of the evolution of college marketing in a typical college provides a useful explanation as to how and why these difficulties have arisen, and the developments which are still required if marketing is to become firmly embedded in the thinking and decision-making of educational managers.

THE EVOLUTION OF COLLEGE MARKETING

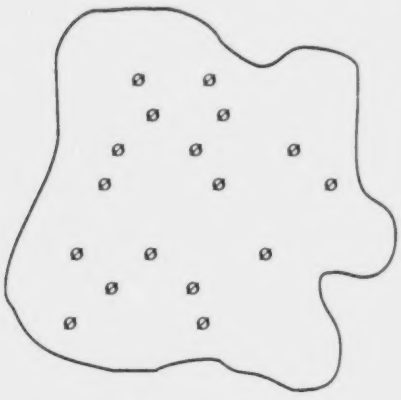
Stage one: random marketing and sales activities run throughout the college.

Marketing activities in colleges evolve initially from unco-ordinated random sales activities.

In some parts of the college there are very good marketing practices. In others there are bad ones. In the worst cases, marketing activities are conflicting, duplicating efforts, or are non-existent.

Establishing a central marketing function upsets this *status quo*, because as a first step it requires marketing activities to be co-ordinated.

Stage two: an embryonic corporate marketing function corrals these efforts



Establishing corporate college marketing means that the first step is to corral these disparate sales activities.

This process of reining in causes unrest at faculty level, but is essential if the college is to gain the benefits of synergy from its tactical marketing activities.

Marketing cannot work without a developed toolbox of marketing activities. Therefore, an important priority has to be to establish and co-ordinate databases, market research capabilities, a corporate house style and publicity policy.

Unfortunately, this tactical involvement has frequently been seen as threatening and frustrating by those previously involved in the selling activities at course level. The process has often been perceived within faculties to be disempowering and has caused much heartache and antagonism.

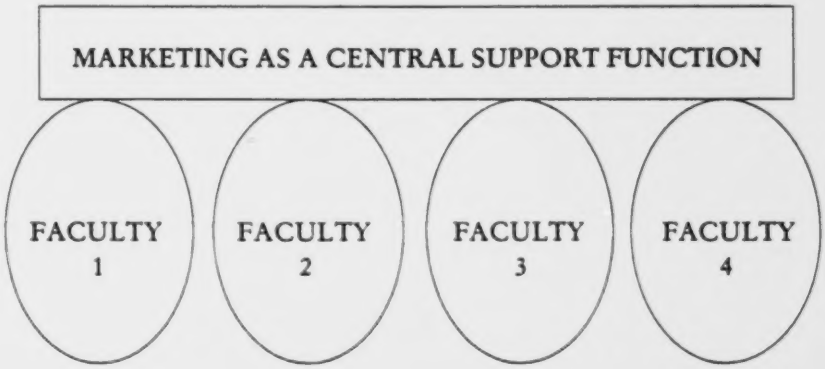
Nor has this essential first step assisted the overall perception of the role of corporate level marketing. College marketing managers who were first seen to be performing tactical functions have found it very difficult to persuade management that the correct positioning of central marketing is at strategic management level.

Having been through this process ourselves, and with the benefit of hindsight, we can now see that this stage is only short-term; but it is an inevitable step in the evolution of corporate marketing within the philosophy and framework of any academic institution.

Once the framework and parameters for marketing activities have been established centrally, the next stage (and one that few colleges have yet reached) involves implementing a clear strategy for decentralising the marketing effort into the faculties and departments.

Stage three: marketing provides a central support role

Once marketing at a tactical level has established frameworks and procedures, the marketing activity can be decentralised, but the overall approach of the faculties will now be co-ordinated and synergical.



By this stage, corporate marketing should be playing a support role, advising strategic decision-making as well as acting as an internal consultancy service and co-ordinator for the faculties. Marketing activities which can best be provided from the centre - for example marketing research - should by this stage be well-established.

Having reached this point, the faculty marketing co-ordinators will have taken on the commercial role equivalent to product or brand managers. They will be highly influential and responsible for the co-ordination of the marketing activity for a group of products, often with responsibility for achieving clear objectives and targets.

Their marketing effort has to remain within the parameters of the corporate endeavour to provide consistency and ensure that the overall organisational goals are met. But the faculty marketing co-ordinators are once more clearly empowered in the wide area of course marketing.

Most colleges are still at stage two of the evolution processes just outlined. We are concerned that for many, either because of the lack of resources, limited commitment to marketing, or because the marketing function has got bogged down and become stuck at the tactical level, some colleges are being very slow in moving on to stage three. As a result there is unnecessary friction between central marketing and

faculty management, and the college is not maximising the potential returns for adopting an integrated marketing approach.

Equally serious difficulties have arisen because of the grades to which many marketing appointments have been made. This can mean either that:

- marketing managers are not considered to be part of the senior management team and are therefore not able to advise (or even see) faculty heads and senior management; or

- where marketing is in the vice/assistant principal's remit, it is in danger of being viewed as an imposition from above and something to be resisted.

Marketing should be a function of senior management. It is at the core of the activities of running any operation. The role of the marketing manager, whatever his/her grade, has to be to advise and inform management throughout the organisation. In particular, until education managers at all levels have developed marketing experience and expertise of their own, faculties need to treat central marketing as an internal consultant available for support and advice.

At present, marketing is too frequently treated as a separate and isolated activity tagged on to the normal management role. Yet to be effective it has to be integrated and absorbed into that role. Marketing should be viewed as being on a par with the financial aspects of management; an integral element of all management thinking and plans, but with expert advisers available for consultation.

Both writers of this workbook have headed academic departments as well as central marketing functions, so we are only too well aware of many of the obstacles and worries which need to be addressed before marketing is truly integrated in faculty level management. We have seen both sides of the picture and our personal experience has given us opportunities for practical involvement in seeking solutions to many of the issues which marketing has brought to education.

In this section of the workbook we want to share with you some of our experiences. The marketing approach and structure with which we conclude is, in our opinion, the one best suited to the needs of those managing a faculty or department. The material included has been put together in order to help you to tackle marketing issues, obstacles and practical difficulties. We hope this material will rapidly enable you to reap the benefits marketing has to offer, by helping you to facilitate the process of embedding and implementing marketing effectively in your faculty.

Marketing at faculty level

Different colleges and the different faculties within a college will have different experiences and expectations from marketing. In large colleges in particular, it is not effectively possible to treat the whole organisation identically.

The faculties represent the college's product offerings. These are grouped together, usually in subject areas. These product areas find themselves at different stages of their 'life cycle'. In many colleges the newer subjects like information technology (IT) and business studies are still enjoying considerable growth in demand, whilst more traditional areas such as engineering and building trades may be experiencing falling levels of demand. These various faculties will be looking for different things from marketing. The former will seek help in the processes of matching demand to the available capacity. The latter need to identify new markets and opportunities to replace those in decline.

Sadly, too few faculty managers and course directors are turning to marketing to help solve these strategic issues. Many perceive that they have been 'doing' marketing quite successfully through the production of course literature and the ongoing tasks associated with filling courses which have been undertaken for years. Many course directors are sophisticated salespeople, using their own databases of clients and personal contacts, sending out mail shots and interviewing potential customers. Press releases may have been sent out regularly; corporate contacts entertained; support and sponsorship won.

It is hardly surprising, then, to find that at the 'coal face' of education many feel that they already know all about marketing, and as a result they have been slow to recognise the need to dig deeper and reappraise its full strategic potential. So, although those managing the operational level of education are no strangers to the tactical activities of marketing, they have tended to underestimate or ignore its potential for providing strategies to tackle the various needs and market scenarios which impact on the faculty.

Most faculty management teams are sales oriented in their thinking. They still perceive marketing to be a service function, an activity responsible for selling course places and one which is the responsibility of the college marketing unit or the faculty marketing co-ordinator. They are using the marketers' toolbox, but have not adopted a marketing approach. The danger is that we have dressed up our sales activities and called them marketing, without a true appreciation of the essence of marketing and what it means. This charade of marketing is blinkering management's appreciation of the potential benefits a true marketing orientation could offer.

The benefits of marketing

Biting the marketing bullet may be hard and it will take time to digest, but it will bring benefits to the faculty.

- Working within a college-wide marketing framework will increase the effectiveness of your marketing efforts, reducing duplication of sales activity and allowing you to achieve your faculty objectives with less resources of staff time, effort and budget.

- The co-ordination of the various elements of marketing, brought about by marketing management, results in a synergy and increased effectiveness of the operation.

- Applying marketing techniques to portfolio planning and new product development will improve the security of jobs in your area of activity and the college generally.

- Working with central marketing will allow marketing knowledge and skills to be passed on to your staff. In the future, a marketing perspective will automatically be built in at every level of thinking and decision-making.

- By managing the necessary process of change and integration, there will be less conflict and resentment generated.

- A marketing approach offers you the framework to deliver improved customer benefits.

In order to gain these benefits, the faculty has to move forward towards a real marketing orientation. The customer has to be seen to be the responsibility of everyone - support staff, academic staff and management. A common feature in all service industries is the requirement for operational staff (in education this is the academics and support staff) also to be the front line marketing/salespeople. In this respect education is no different from hotels, passenger transport or catering. The real customer interface is at faculty level.

Everyone has a contribution to make in ensuring that the customer is satisfied. The best promotional material in the world will have little impact if the section has a poor reputation for quality course provision, bad results or uncaring staff. For a faculty to become more marketing oriented, the importance of the customer has first to be owned and believed by the management team and then cascaded through training and example to the remainder of the faculty.

Once management starts to think in this way, the attitude of customer care is infectious. Eventually, all staff will see themselves as problem solvers for students, and new courses and programmes will be devised - not simply against academic criteria - but against an assessment of what the targeted users will want from the course. Every decision made will then increasingly be informed by a consideration of its impact on the customer and consumer.

This view is a fundamentally different one from the role of marketing being seen simply as a collection of activities undertaken to sell places on courses. Without a clear objective of running the organisation to satisfy the needs of its customers, the philosophy of management cannot truly be one of market orientation.

EMBEDDING MARKETING AT FACULTY LEVEL

Ideally, the driving force towards a more market oriented approach will come from college senior management, supported by an established and adequately resourced corporate marketing function. Whether or not this is true in your college, it is still possible for a faculty within a college to begin the process of embedding marketing into its management thinking and planning processes.

This section of the workbook is designed to help you with this process within your faculty.

Reviewing the faculty marketing function

The first step is for you and your faculty management team to take time for a long look at marketing, what it is, how you feel about it and how well you do it in your section of the college.

We know from personal experience and contact with staff from many educational institutions that many colleges are stuck at stage two of the evolutionary process (as outlined on pp6-8) and that there is still widespread misunderstanding about the role of marketing, as well as confusion and lack of co-ordination in its implementation at faculty level. If we are brutally honest there is a certain amount of bad feeling about what is still seen by many of our colleagues to be a 'flavour of the month' fad of senior management.

We would like to help you, as managers, to take stock of your position *vis à vis* marketing and to help you address the following questions.

- How does your faculty management team relate to marketing?
- How well does the team understand the functions and strategic potential of marketing?
- Are you getting the maximum benefit possible from the central marketing function?
- How well are you using the activities of marketing in your faculty, and gaining the potential marketing benefits?

ACTION

Before moving on, we recommend that you take some time to evaluate the current role, status and contribution that marketing makes to your faculty. Use these topics for an open discussion in your next management meeting. Ask your team to identify:

- what is good and bad about the marketing function, both within the college and within the faculty;
- what more could be done to help the college marketing team;
- what more they could do to help you;
- any areas of real/imagined difficulties between the faculty and central marketing;

and in addition ask your team:

- to clarify their own level of marketing awareness and understanding.

The following questionnaire will provide you with some food for thought in this task. It can be reproduced and sent out to your team.

MARKETING: AN EVALUATION OF THE FACULTY MANAGEMENT'S VIEWS AND PERCEPTIONS

This brief questionnaire has been designed to help us assess our current standing on marketing issues in this faculty.

Q1 **Marketing has an important role to play in our faculty.**

Yes ☐ No ☐ Maybe ☐

Q2 **Are you satisfied with the contribution that marketing is making to the overall achievement of the faculty aims, objectives and targets?**

Yes ☐ No ☐

Q3 **Do you think we are using marketing in an effective way at the moment?**

Yes ☐ No ☐

Q4 **Do you see any conflict between our marketing activities and those of the college's corporate marketing function?**

Yes ☐ No ☐

If yes, please specify:

_____

_____

_____

_____

Q5 **Do you think our marketing activities are currently adequately resourced?**

Yes ☐ No ☐

If no please elaborate: _____

_____

_____

Q6 **To help us identify the functions you think should be a priority for our faculty marketing activity, please consider the list of possible responsibilities given below:**

- Indicate with a cross any which you feel should not be included at all, and with a C any which you feel should be undertaken at corporate level or centrally.
- Place a number beside those remaining to indicate your priority ranking (1 = top priority).

Activity		Ranking
1.	Arranging schools and employer liaison	☐
2.	Seeking sponsorship and support for the faculty	☐
3.	Filling courses which have failed to enrol	☐
4.	Producing the course literature	☐
5.	Maximising press coverage through press releases	☐
6.	Ensuring faculty areas and notice boards etc. create the right faculty image	☐
7.	Advising on new courses and course closures	☐
8.	Conducting marketing research	☐
9.	Advising our team during the faculty planning process	☐
10.	Writing and implementing a faculty marketing plan	☐
11.	Establishing and maintaining the faculty image and positioning	☐

Q7 **How would you assess the attitude to marketing in our college and faculty?**

- **Indicate True/False against each statement. These should be your personal perceptions of the views of the following three groups.**

A. College management view:

- Marketing is an important and valuable dimension of our management approach. True/False
- We are totally committed to the marketing activity. True/False
- Marketing is just jargon for publicity. True/False
- We do not really understand what marketing is. True/False
- We pay lip service to the activity of marketing. True/False
- Marketing is a necessary evil. True/False
- What is marketing? True/False

B. Our faculty management view

- Marketing is the responsibility of the faculty marketing co-ordinator. True/False
- Central marketing is valuable because it handles the prospectus and helps sell under-subscribed courses. True/False
- Marketing should play a bigger role in our decision-making. True/False
- Marketing is a threat to our authority. True/False

- We do not really understand or use marketing properly. True/False
- We are unconvinced of the benefits of marketing. True/False

C. *Course directors' view*

- We do not need central marketing. True/False
- We do not need help in selling our courses. True/False
- Marketing does not need co-ordinating within the faculty True/False

Q8 Should we adopt a more customer oriented focus in this faculty?

Yes ☐ No ☐ Maybe ☐

Q9 Are we prepared to make additional commitment to marketing?

Yes ☐ No ☐ Maybe ☐

Q10 What would you like to see marketing achieve for us over the next 18 months?

_____

_____

_____

_____

If there is uncertainty or a large number of unresolved problems identified as a result of the questionnaire exercise, we recommend that the faculty team arranges a 'Marketing Away Day' with a qualified marketing facilitator to provide some input on marketing management and to work with you in order to produce a faculty marketing action plan.

Details of such a programme are provided in Section 1 of this workbook.

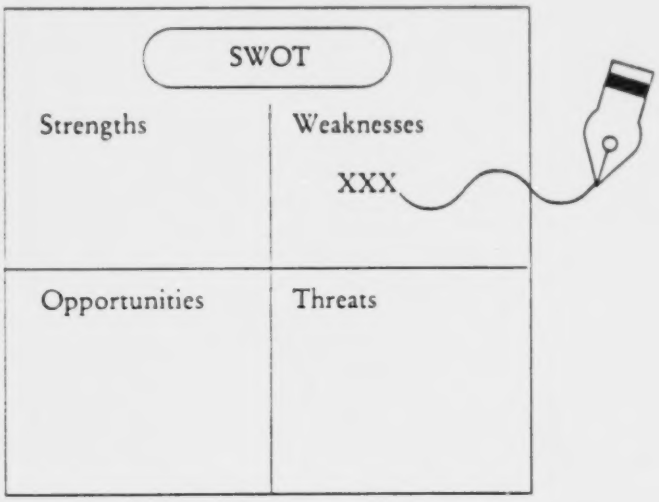
The next step is for the faculty to take an equally hard look at how marketing is currently implemented in your section. This needs to be an honest (warts and all) evaluation.

FACULTY MARKETING AUDIT

The purpose of such an audit is to provide a framework which will force you into taking a fresh look at what you actually do in marketing terms. The following SWOT analysis and checklist can be used as the basis of a complete evaluation of your marketing and customer care. The process will take time, but will provide you with some useful insights and information for compiling a list of priority actions.

ACTION

A SWOT analysis approach may be useful, classifying all the internal factors which could be changed by management action under strengths and weaknesses, and classifying all the external factors which are uncontrollable as opportunities and threats.



We cannot endorse too strongly the Peters and Waterman technique of management by walking about as described in their 1982 book **In search of excellence**. Do not rely on what you think you know: go out and look, talk to your customers at the coffee machine or in the refectory, ask the staff - particularly new members of staff - for their impressions can be real eye openers. Get all faculty management to do the same or go through some of the checklist and compare notes. Remember that you are likely to find evidence of both good and bad practice within the faculty.

CHECKLIST FOR A FACULTY MARKETING AUDIT

A. Communication

- **How easy is it for potential customers to reach you?**

  1. Go to reception: are there clear signposts and plans?

  2. Get someone to ask at reception: can the staff provide straightforward directions?

  3. Ring in and ask to speak to yourself, and then to a course director. How was the telephone enquiry handled; how long did it take? Was there an offer to have your call returned, or were you expected to ring back?

  4. Now try telephoning in with a general enquiry.

  5. Now for the real acid test: repeat items 3 and 4, during a vacation and after five pm.

  6. Telephone a possible adviser for your courses, e.g. a professional institute. Are they able to direct the enquiry to the appropriate/current course director?

  7. Has reception and/or your general office got an up-to-date list of staff, contact and room numbers? Are you sure?

  8. Does your entry in the college prospectus do you justice? Compare it with those of your closest competitors - which would you choose?

- Once they have found you, how well do you communicate with your customers?

  9. Collect copies of all course leaflets sent out.
     - Are they available?
     - Are you happy with them?
     - Are they selling benefits or course features?

- Do they fit into the corporate house style?
- Do they fit into the faculty house style? Is there an obvious faculty image/style?
- Even though budgets are often limited, does the quality of the leaflets reflect the quality of the service you provide? Are there spelling mistakes, is the layout good and clear?
- Do you currently have a policy on course sales leaflets?
- Do you need one?
- Check what procedures are used to reply to enquiries, how long do applicants wait to hear from you?
- How are enquiries processed during the holidays?

10. Do you provide newly enrolled students with information about their course, college, faculty etc?
    - Have you found out what information they want/need when they first enrol, or have you guessed?
    - Is this information in a format which provides added value and a sense of the faculty product, or is it a loose collection of uncoordinated papers?
    - Are the enrolment forms user friendly?
    - Are college security checks handled sensitively?

11. Go and look at your notice boards.
    - Do they look professional, as though they were updated and used?
    - Is each board the responsibility of an identified member of staff?

12. Check on how well you listen to your customers.
    - What happens about comments/complaints made at boards of study, course boards etc?
    - Choose a couple of courses at random, go back over minutes and review the follow up action. Pay particular attention to comments about non-academic aspects of the course, e.g. catering and car parking.
    - Invite a selection of group representatives for a meeting/sherry/tea and talk to them.

B. Image

The image created by your faculty will be made up of a number of elements, some of which are outside your control, such as the fabric and location of the building. There are others, however, that can be modified or influenced relatively easily - e.g. the colour scheme of your decor, the attitude of staff and the professionalism of your customer contact.

1. Ask around to discover the image of your section.
   - Is it traditional or modern; friendly or hostile; education or training; professional or amateur?
   - Different people will have different views. They all matter.
   - Senior management's perceptions may influence budget allocations, and colleagues' views shape the morale and status of your section.
2. Remember - other people's perceptions matter more than reality. If you are disappointed with your image responses, you need to look hard at your communication activities again.

C. Product

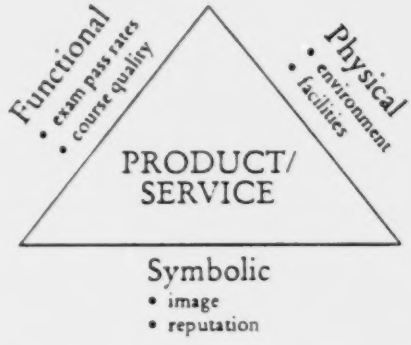
- What product or service are you providing?

1. Can you easily list five benefits of coming to your faculty?
   - If not, you cannot expect staff to do any better, but try them.

   Everyone should know what your unique selling points are - what you provide better than the competition, be that another college, or another faculty. It may be excitement, interesting career opportunities, location, easy access to accommodation, or excellent staff. Benefits need to be expressed in terms of student needs, not course features.
2. What percentage of your courses are usually oversubscribed?
3. Is demand falling or rising?
4. How many courses have been withdrawn in the last two years, and how many new courses added to your portfolio?

Intangible services like education are of course hard to quantify, but the bundle of benefits and facets that make up a course place all represent the product you are selling. This needs to be considered in all its dimensions. In the eyes of the customer, products/services exist in three dimensions (see **Figure 2**). It is the combination of these which makes up the product package. You need to consider and assess all relevant characteristics. Remember - it is how these are perceived that matters.

Figure 2: The product package



Quality assurance issues are essential, but criteria need to reflect the needs of the customers. If exam passes are important (for example, in professional examination areas) this will be a critical factor in the success of the course. If the needs met by the course are social and leisure interests (for example, an evening course in holiday Spanish), the atmosphere and environment may be more important.

The relative strengths and weaknesses of your resources, including teaching staff and physical environment, will automatically influence which programme areas are likely to be more successful.

D. Pricing

1. Have you a policy on course pricing?
2. Has this been reviewed recently?
3. Do staff know about it and understand it?

Small fee increases can often support substantial improvements in facilities and services and should be investigated. Courses which are oversubscribed are obvious candidates. Higher fees can actually increase demand, as students and employers often judge quality by price.

E. Availability

1. First impressions count, so find out how problems of waiting lists and availability of places are handled.

2. Review enrolment procedures; is the first impression one of queues and maximum difficulty in paying?

3. When are courses available? Are there September starts only, with traditional delivery patterns such as two evenings a week, or are there new approaches combining open learning, in-company delivery or breakfast sessions?

F. Staff training

Staff are clearly critical to the success of any course.

1. How many have had sales or marketing training to help them in their role as course sales person?

2. Is customer care and telephone skills training available and being used by your staff?

G. Marketing planning

1. Do you have clear faculty marketing objectives and priorities?

2. How are these integrated with your faculty plan?

3. What system exists to co-ordinate marketing activities in your section; e.g. mail shots and press releases etc.

H. Evaluating opportunities and threats

Opportunities and threats are external factors beyond the control of your management team. Nonetheless, they need to be identified, and reaction to them included in your plans and strategies. Monitoring and forecasting the key variables in your external environment is an essential dimension of the marketing audit.

1. Who are your current competitors?
   - What do you know about their future plans?
   - What do you expect them to offer next year?
2. Is your customer base likely to stay the same?
   - What are the likely demographic changes in the area, and how will they affect you?
   - What are the likely changes in the community or local business sector?
3. What are the opportunities and threats for funding and support?

Political, economic, social and technological changes all influence the customer base and the product needed, creating both opportunities and threats for your department. The job of your team is to recognise and deal with these opportunities and threats proactively.

Formulating marketing strategy

At faculty level, marketing strategy should be an integral part of the faculty plan, not a separate document.

To start the process of devising strategy you need to have:

- a marketing SWOT analysis completed for the faculty (as shown on p20), with a clear indication of product/market opportunities and threats, along with an evaluation of the faculty's marketing mix, listing the strengths and weakness as to the four Ps of product, price, promotion and place/availability;
- a set of faculty objectives, quantified over time and expressed with an indication of the faculty's strategic direction. This should include relevant aspects of corporate marketing strategy and objectives.
- advice, market research information and the expertise of an experienced marketer, preferably the college marketing manager in the role of internal consultant.

INTEGRATING MARKETING INTO YOUR FACULTY PLAN

Faculty strategic objectives should indicate product/market opportunities and positions which you wish to achieve.

A critical aspect of this is to undertake the necessary research to allow clear statements as to which market segments should be targeted by the faculty. The more tightly these can be identified, the more effective the marketing effort will be. When dealing faculty-wide, there will of course be a number of segments to which the faculty needs to be addressing its activities.

The strategic direction and objectives will, however, allow you to prioritise these segments. For example, if there is a revenue generating objective with a strategy to develop a faculty-wide short course provision, the target market may be companies.

Tight segmentation requires that this target market is further specified, for example, as middle-sized companies operating within a 15 mile radius of the college, employing between 50 and 500 people, with a turnover of at least £2 million, and working in particular business sectors.

The process of segmentation needs further work as the buying behaviour and decision-making units operating in this sector need to be researched and identified.

- Who currently provides the training to this sector?
- Who in the company makes the training decisions and who influences them?
- What are their training needs, and which benefits are not currently offered by the competition?
- When, where and how are training decisions reached?
- What factors influence the decision - price, availability, timing of courses etc.
- How can this market segment be accessed?

The amount of information you will have available at this stage depends on the market research function available to you.

ACTION

Taking each of your objectives and strategies, go through the process of identifying - researching where necessary - the target markets, decision-making units and buyer behaviour for all of them in turn.

Segmentation is the tool marketers use to allow clear targeting of the marketing effort. The co-ordination of that effort is spelled out in the plan and entails balancing the elements of the marketing mix. These are the variables which marketing can change to influence demand and are represented by the four Ps of product, promotion, price and place or availability. What each of these encompasses has been indicated in the SWOT checklist earlier in this section (on pp21-26).

Although each of these variables is described separately, it is important that marketing people remember that it is only when the variables are managed in concert that a synergy is achieved, producing the desired outcome with a minimum use of resources.

A complete marketing plan would include a detailed action plan encompassing activities against time and budget for each of the four Ps of Product, Promotion, Price and Place (see Section 2, pp16-20). Integrated into the faculty business plan should be clear indicators of faculty policy on pricing, faculty promotion, course provision and areas of new course development.

Note: take care with the timeframe in the area of education, as academic years and public sector planning often limit flexibility. Operational constraints such as gaining course approval mean that new product development may need planning over the medium rather than the short-term time period.

CHECKLIST FOR FACULTY MARKETING POLICIES

Product:

- Establish clear criteria for assessment of new product development and systems to encourage ideas for new products from staff.
- Establish criteria for market research and needs analysis to be provided in support of any proposed new course programme.
- Develop a system for regular product portfolio analysis and review.
- Establish a policy of priorities in terms of improved environment and facilities to be addressed by the faculty.

Promotion:

- Clear policies need to be established on communication with customers. These may be the college policies on image, or the faculty's own identity established within the college framework. They should include:
  - typeface and logo decisions;
  - house style for all literature;
  - procedure for press releases;
  - guidance and resources to provide a professional standard of course materials on enrolment.

Price:

- If pricing decisions are to be made by course directors, clear policies for their calculation need to be established by management.
- Policies on discounts etc. should also be clarified.

CHECKLIST - FACULTY MARKETING POLICIES

Place:

- Agree and implement a policy on applications and enrolment procedures.
- Establish clear quality objectives for:
  - number of days between application and response;
  - waiting list priorities;
  - interview procedures; and
  - telephone enquiries.

The establishment of clear policies allows course directors to pursue their sales objectives and course targets in ways which ensure a synergy in all the faculty's marketing activities.

Obviously, the development and implementation of policies needs to be done gradually, establishing priority areas to be worked on first. At this early stage, do not expect to get everything absolutely right first time. Be realistic with your expectations, but committed to the direction of change. Do not aim to be perfect - only better. And broadcast success stories.

IMPLEMENTING YOUR PLAN

Putting the plan into operation effectively is crucial, not merely for the faculty, but for the college's success.

Implementation in essence boils down to achieving the sales objectives for individual courses and course areas. To allow this to happen course directors need:

- clearly communicated sales targets;
- clearly communicated policies or parameters within which to operate. The faculty marketing policies checklist gives some indication of the areas which should be considered;
- training in sales and negotiation; and
- support in developing tactical marketing competencies.

Making it happen - hints and tips

The process of identifying the strengths of your current marketing and sales activities and capitalising on these will take time. Your central marketing team will be able to give you more practical help, but we have put together a short list of hints and tips which may be of help.

- Establish a faculty database to co-ordinate key corporate contacts of the faculty.

- Agree two or three dates when mail shots will go out to specified market segments. Publicise these to allow all relevant course leaflets to be included.

- Produce a faculty list of key decision-makers and influential people with whom the faculty wishes to build strong relationships. Develop a timetable for their being entertained either by the faculty or corporately.

- Establish one or two training courses for faculty staff development, for instance:
  - writing course leaflets,
  - sales/negotiating skills,
  - customer care training,
  - telephone skills training.

- Develop a sponsorship plan for the faculty. Produce a shopping list of requirements, equipment, resources and skills. Brainstorm for potential sources. Remember that you have to offer the sponsor benefits in exchange.

- Develop a close working relationship with the central marketing function. Find out what they can do for you and what you can do for them.

- Review the use of telephone sales techniques to fill courses as opposed to the use of direct mailings.

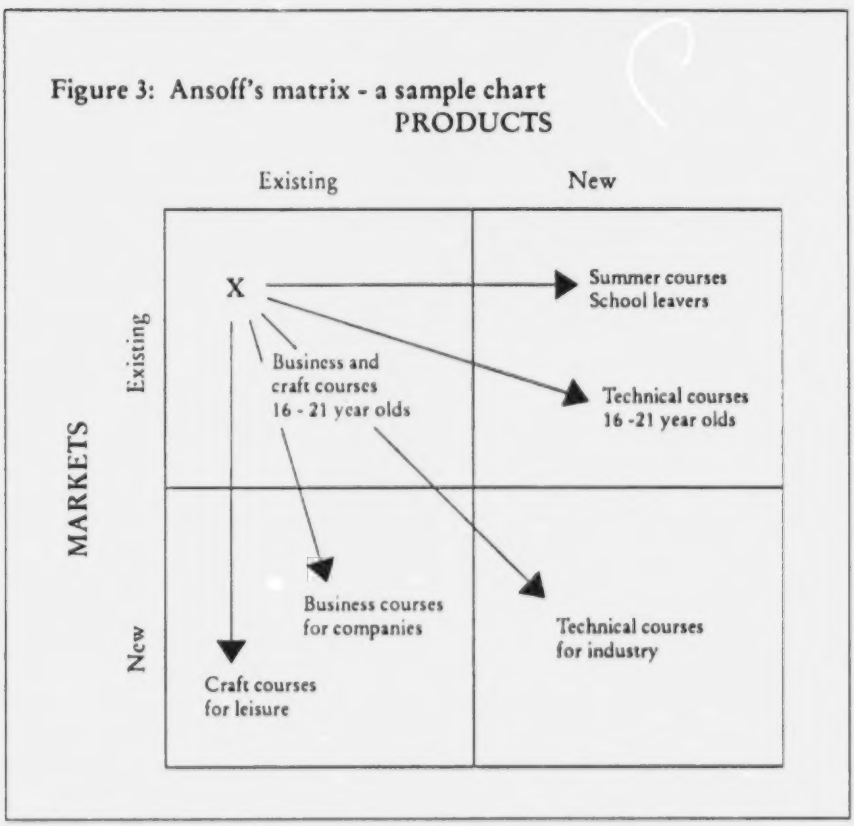
- Improve your knowledge of your customers. Add questions to end of year evaluations. Get students to undertake specific research projects as part of their project activities.

- Set up a sales working group to staff exhibitions, school liaison etc., and agree policies.

- Develop a programme to facilitate a complete portfolio analysis. Have course directors report on their courses against pre-determined faculty criteria such as demand levels, publicity opportunities, contribution to college policies on issues such as equal opportunities, and potential future developments and opportunities.

  This process will allow you to evaluate each programme offered in terms of its product life cycle and to identify opportunities for modifying courses and developing new ones. **Figure 3** shows a sample of an Ansoff matrix, which can be used to chart new product/market opportunities. See the **References** at the end of this section for more details on this technique.

Figure 3: Ansoff's matrix - a sample chart



- Establish a system of control which enables you to assess and evaluate all aspects of your marketing activities. Marketing will only improve if it is informed about past successes and failures and is able to learn from them.

- Make sure that a specific person is nominated as faculty marketing co-ordinator, and if possible support his/her activities with a team drawn from faculty staff.

Within the faculty, marketing activities already being undertaken need co-ordinating in order to avoid duplication of effort and a waste of resources.

The difference between what faculties have been doing for years and what they should do in the future is dependent on establishing clear objectives, strategy and policies to focus the energy of activities - so that everyone is pulling in the same direction.

Good luck.

References

Peters, T and Waterman, R (1982) **In search of excellence.** Harper and Row

For more information concerning the Ansoff matrix, see:

Kotler, P and Fox, K (1985) **Strategic marketing for educational institutions.** Prentice-Hall (p138)

Kotler, P (1988) **Marketing management: analysis, planning and control.** 6th rev. ed. Prentice-Hall (p48)

Marketing for college managers:

a workbook for the effective integration of marketing into college planning

Angela Hatton and
Lynne Sedgmore

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Bibliography

The list below offers more detailed practical guidance and methodology on college marketing to complement this workbook.

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Further Education Unit (1987) **The college does it better - a resource for colleges of FE.** FEU

Hooper, R, Wigan, E and Walker, J (n.d.) **Courses of action.** Lancashire Responsive College Unit, Lancashire County Council

Karen, F A (1985) **Marketing PICKUP - a staff development programme.** Wigan Foundation for Technical Education (A pack of 6 units plus slides, OHP, audio tape and exercises)

Kotler, P and Fox, K (1985) **Strategic marketing for educational institutions.** Prentice-Hall

Megson, C and Baber, M (1986) **Taking education further - a practical guide to college marketing success.** MSE

Shreeve, R, Thorp, J and Rickett, J (n.d.) **Marketing Hertfordshire colleges - areas for action.** Hertfordshire County Council/Ware College Marketing and Information Unit

Theodossin, E (1989) **The responsive college.** (A comprehensive multi-media guide to college marketing) Blagdon, FESC (now The Staff College)

In addition we would recommend the following general books on marketing:

Hatton, A, Roberts, P and Worsam, M (1992) **Solving the management case.** Butterworth-Heinemann for CIM

Lancaster, G and Massingham, L (1988) **Essentials of marketing.** McGraw Hill

PRACTICAL MARKETING SUPPORT FOR COLLEGES

Led by consultants Angela Hatton and Lynne Sedgmore, TACTICS is able to provide practical support and back-up to the material covered in this workbook. Our experience in both education and industry enables us to offer radical, effective and practical solutions to your strategic and tactical marketing problems.

We are aware of the problems and limitations faced by education and we offer a flexible, creative value for money service which will free up management time for other strategic issues.

CONSULTANCY

- Often colleges do not have the resources to appoint the marketing expertise they need. Our consultancy service can provide an objective overview, specialist marketing input or just an extra pair of hands. We will help develop action plans or work through to their implementation. Wherever you are on the marketing continuum, TACTICS can ensure you get the best out of your marketing. We have worked with a large number of colleges and educational organisations and can offer that collective experience to help develop the opportunities faced by your college.

- We undertake tactical projects in marketing research and college promotion. From developing sponsorship potential to reviewing the college corporate identity or providing a framework for evaluating new course feasibility.

TRAINING

- We will run the training days outlined within the workbook, or develop special programmes to meet your needs in sales training for course directors to customer care inputs for all your staff.

IMAGE DEVELOPMENT

- Successful colleges in the 1990s will have carefully considered their market position and have developed a consistent image to communicate this. Working within the constraints of a limited budget we can help you to reposition and develop your image. TACTICS can provide help with college brochures or prospectus design and production. We have created solutions which have been tried and tested to make budgets go further and provide added value to the college users.

  From about £5.00 per head we can provide your students with a college designed **Welcome Pack**, providing tangible benefits to the students, simplifying your paperwork and ensuring a professional image for your operation. TACTICS will write the contents to your specifications, these can include sections on the college facilities and policies, learning and study guidance, time management aids, maps or guides to who's who in the college.

We would welcome the chance to discuss college marketing with you. To find out how we can help you please call:

Angela Hatton on 081 295 1330 or write to TACTICS, 82 Sundridge Avenue, Chislehurst, Kent BR7 5LU